

**Questionnaire survey for the business on digital
advertising**

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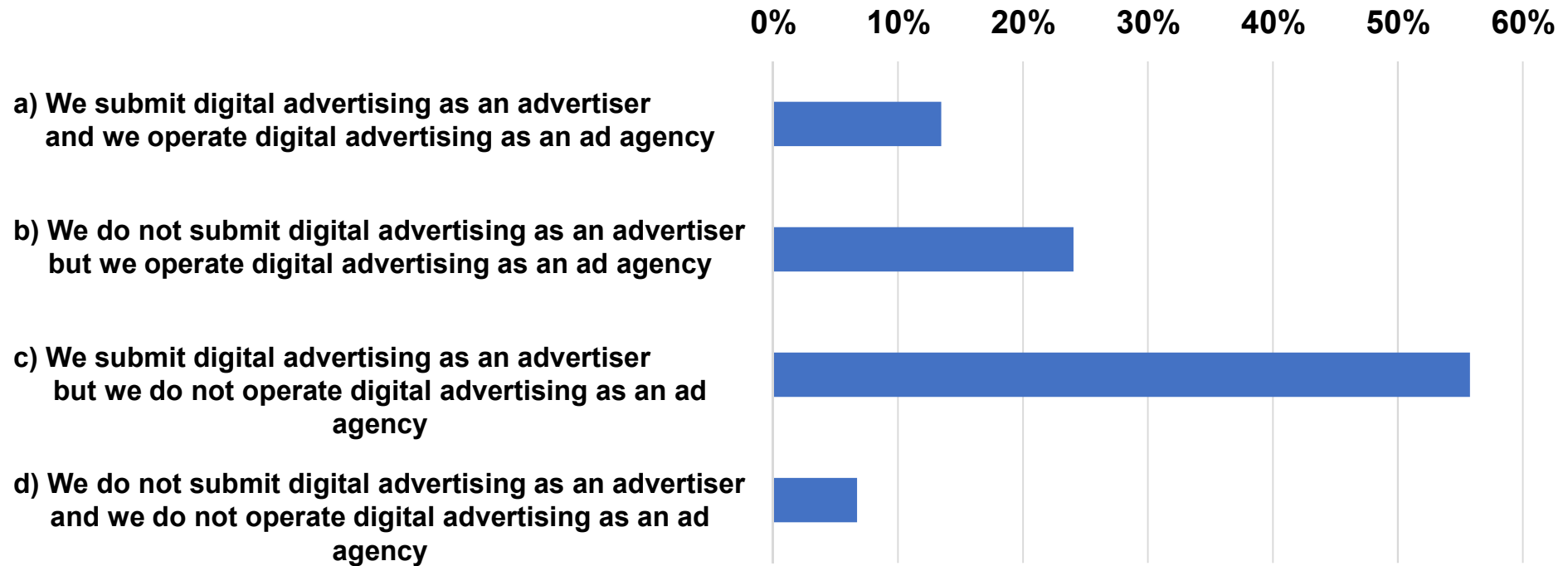
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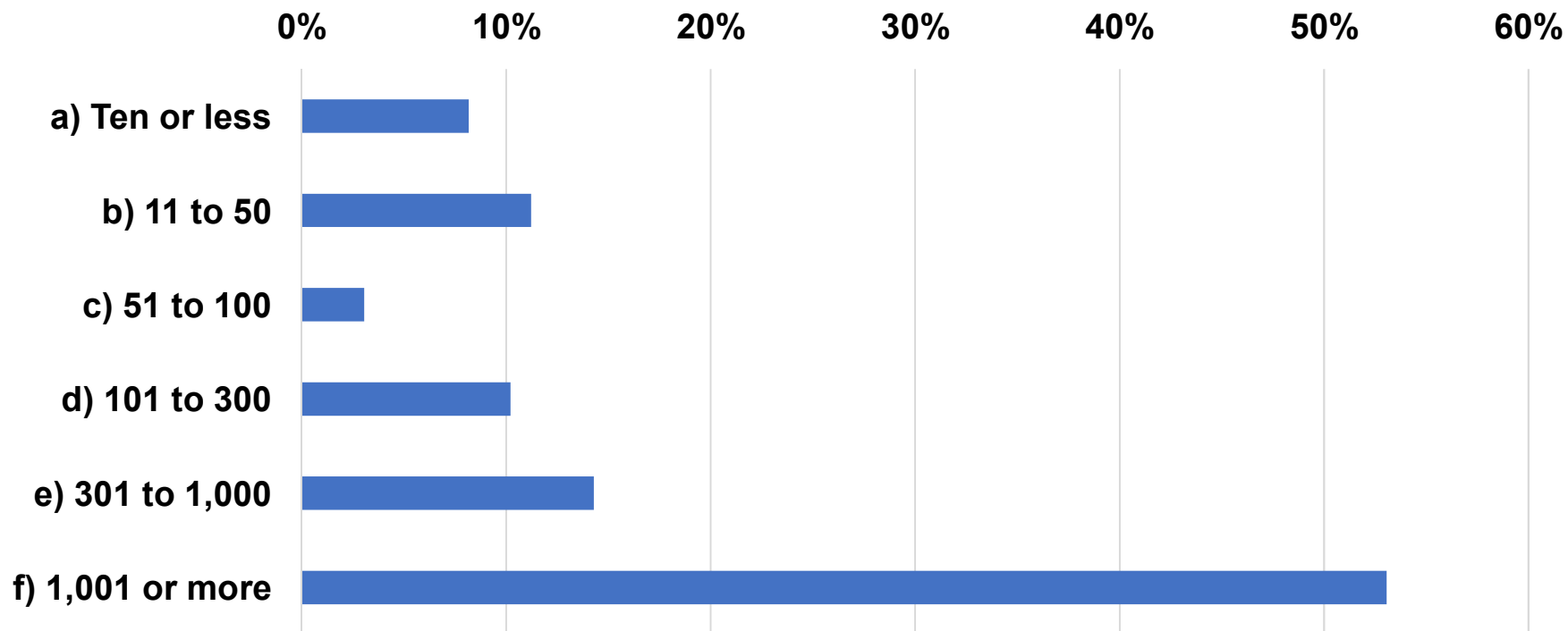
Questionnaire for advertisers and ad agencies

Q1. Do you submit digital advertising as an advertiser, or do you operate digital advertising as an ad agency? [Select one]



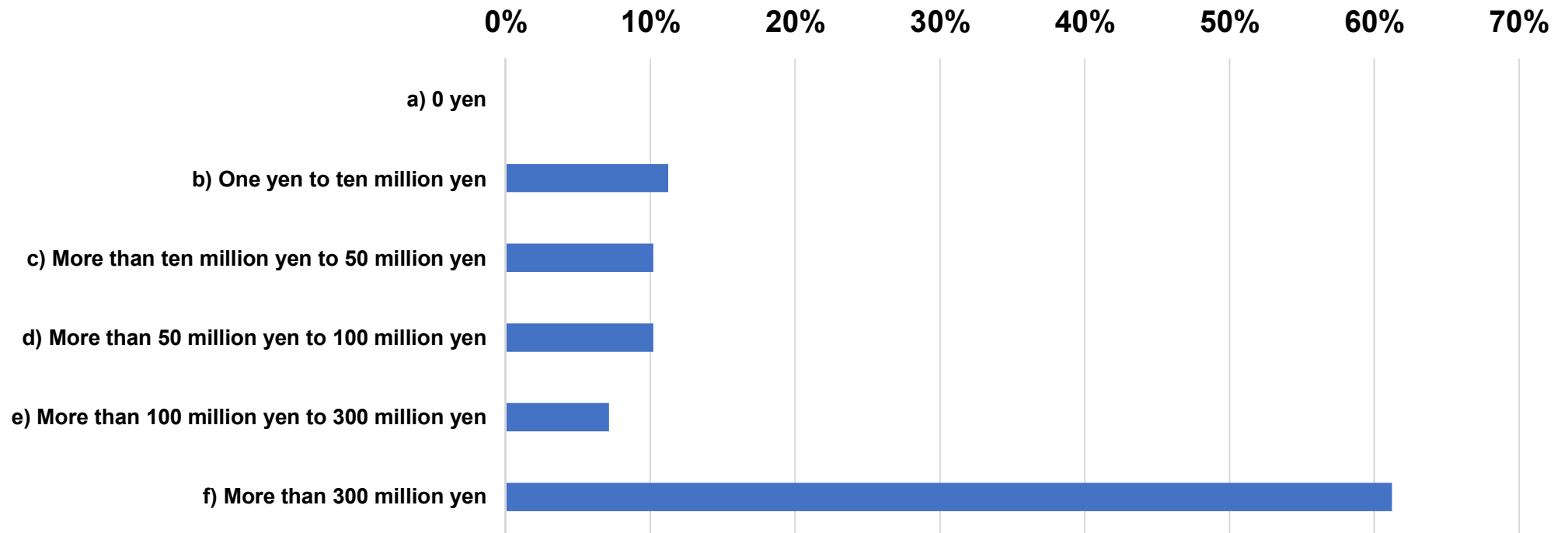
Answers	Number of answers	Ratio (%)
a) We submit digital advertising as an advertiser and we operate digital advertising as an ad agency	14	13.5
b) We do not submit digital advertising as an advertiser but we operate digital advertising as an ad agency	25	24.0
c) We submit digital advertising as an advertiser but we do not operate digital advertising as an ad agency	58	55.8
d) We do not submit digital advertising as an advertiser and we do not operate digital advertising as an ad agency	7	6.7
Number of respondents	104	100.0

Q2. What is the total number of employees in your company? [Select one]



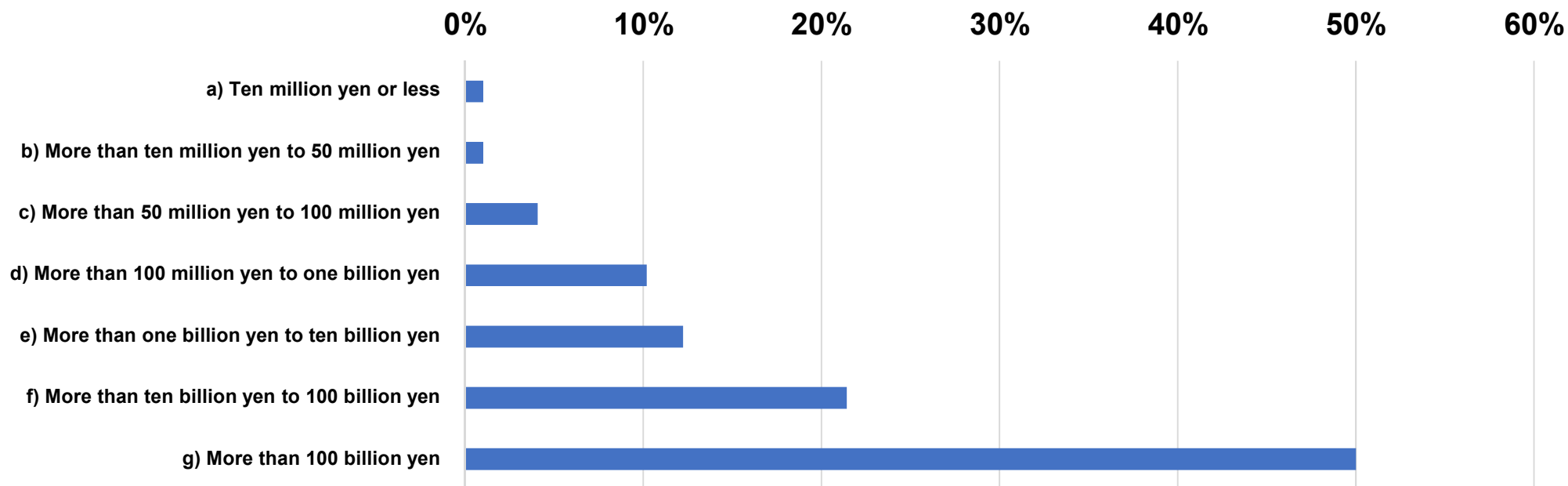
Answers	Number of answers	Ratio (%)
a) Ten or less	8	8.2
b) 11 to 50	11	11.2
c) 51 to 100	3	3.1
d) 101 to 300	10	10.2
e) 301 to 1,000	14	14.3
f) 1,001 or more	52	53.1
Number of respondents	98	100.0

Q3. What is the capital or total amount of investment of your company? [Select one]



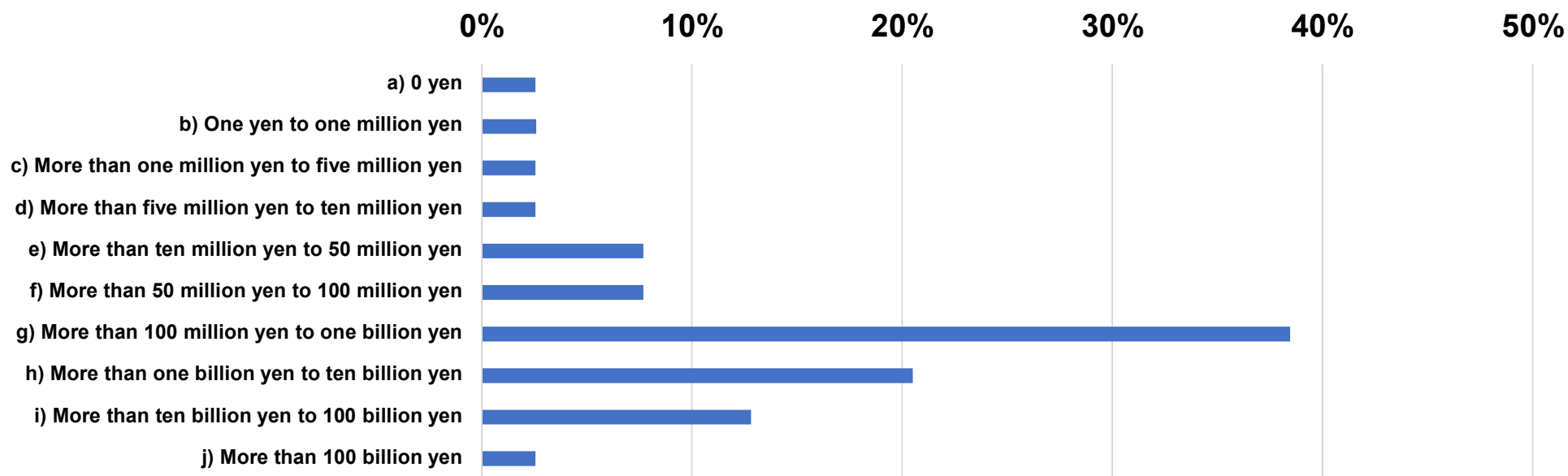
Answers	Number of answers	Ratio (%)
a) 0 yen	-	-
b) One yen to ten million yen	11	11.2
c) More than ten million yen to 50 million yen	10	10.2
d) More than 50 million yen to 100 million yen	10	10.2
e) More than 100 million yen to 300 million yen	7	7.1
f) More than 300 million yen	60	61.2
Number of respondents	98	100.0

Q4. What is the amount of total sales in your company? Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable) [Select one]



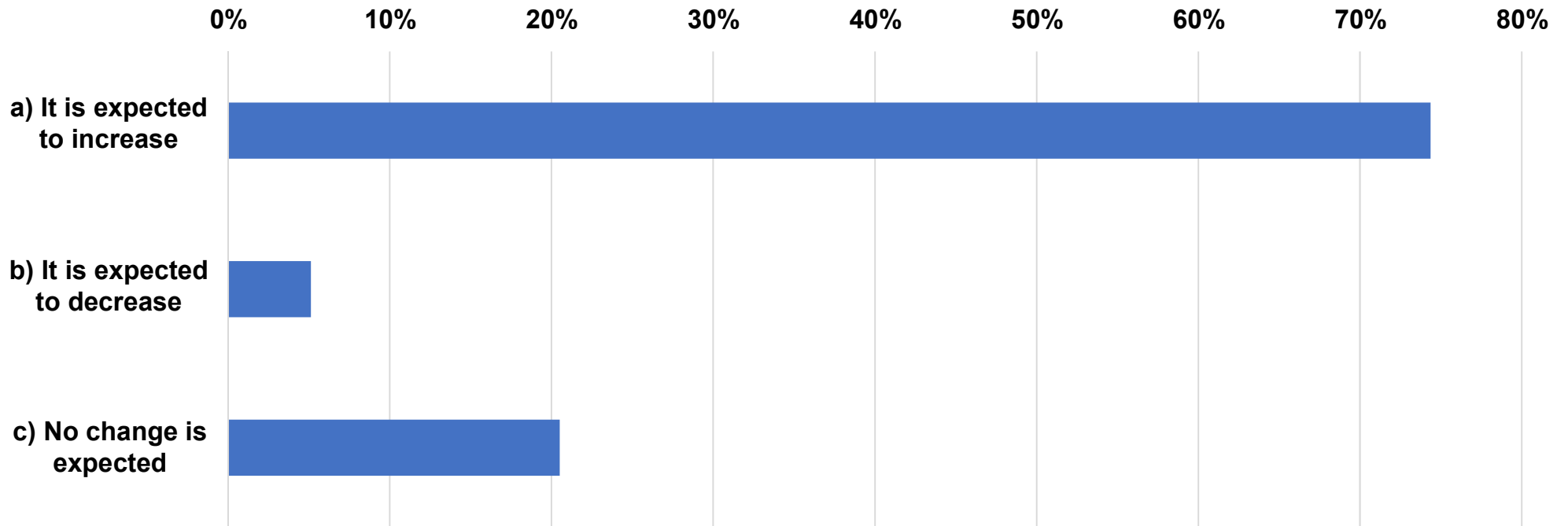
Answers	Number of answers	Ratio (%)
a) Ten million yen or less	1	1.0
b) More than ten million yen to 50 million yen	1	1.0
c) More than 50 million yen to 100 million yen	4	4.1
d) More than 100 million yen to one billion yen	10	10.2
e) More than one billion yen to ten billion yen	12	12.2
f) More than ten billion yen to 100 billion yen	21	21.4
g) More than 100 billion yen	49	50.0
Number of respondents	98	100.0

Q5. (This question is for Ad Agencies) What is the amount of total sales for digital advertising business in your company? Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable) [Select one]



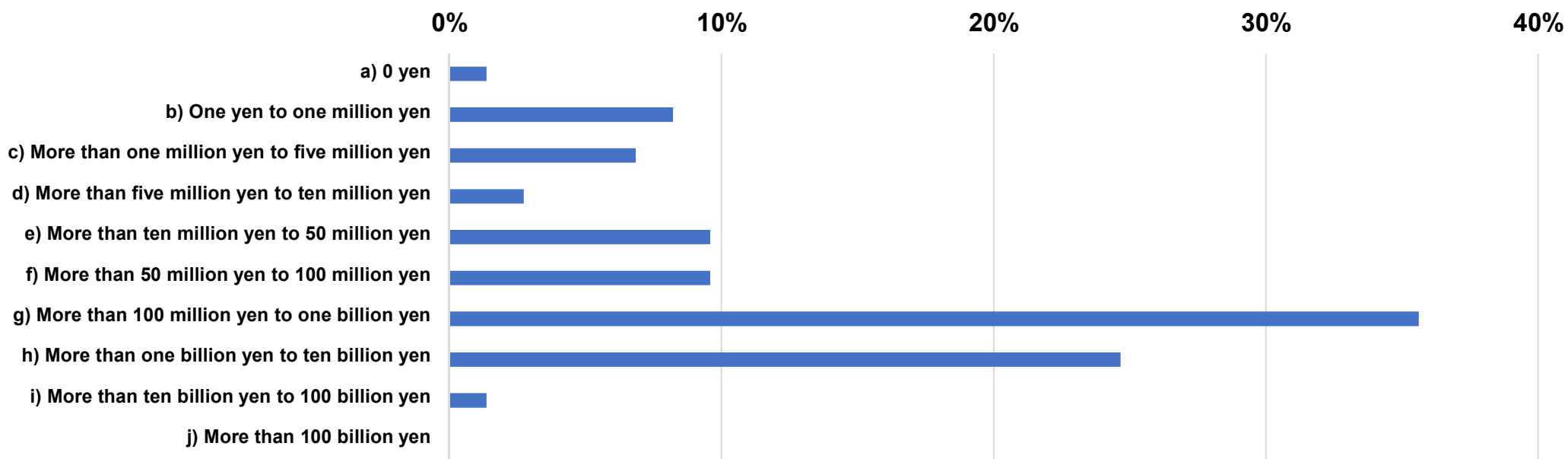
Answers	Number of answers	Ratio (%)
a) 0 yen	1	2.6
b) One yen to one million yen	1	2.6
c) More than one million yen to five million yen	1	2.6
d) More than five million yen to ten million yen	1	2.6
e) More than ten million yen to 50 million yen	3	7.7
f) More than 50 million yen to 100 million yen	3	7.7
g) More than 100 million yen to one billion yen	15	38.5
h) More than one billion yen to ten billion yen	8	20.5
i) More than ten billion yen to 100 billion yen	5	12.8
j) More than 100 billion yen	1	2.6
Number of respondents	39	100.0

Q5-1. (This question is for Ad Agencies) How do you expect the ratio of digital advertising business sales to transition within the overall advertisement sales at your company in the future? [Select one]



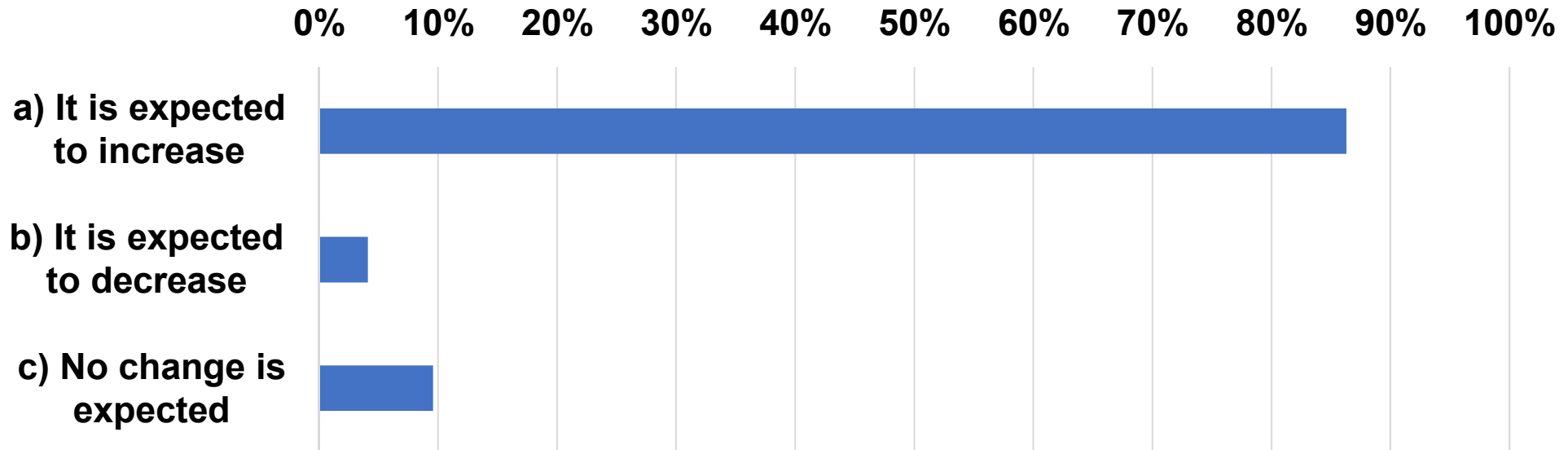
Answers	Number of answers	Ratio (%)
a) It is expected to increase	29	74.4
b) It is expected to decrease	2	5.1
c) No change is expected	8	20.5
Number of respondents	39	100.0

Q6. (This question is for Advertisers) Of all advertising expenses, what is the amount of expenditure used for digital advertising? Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable) [Select one]



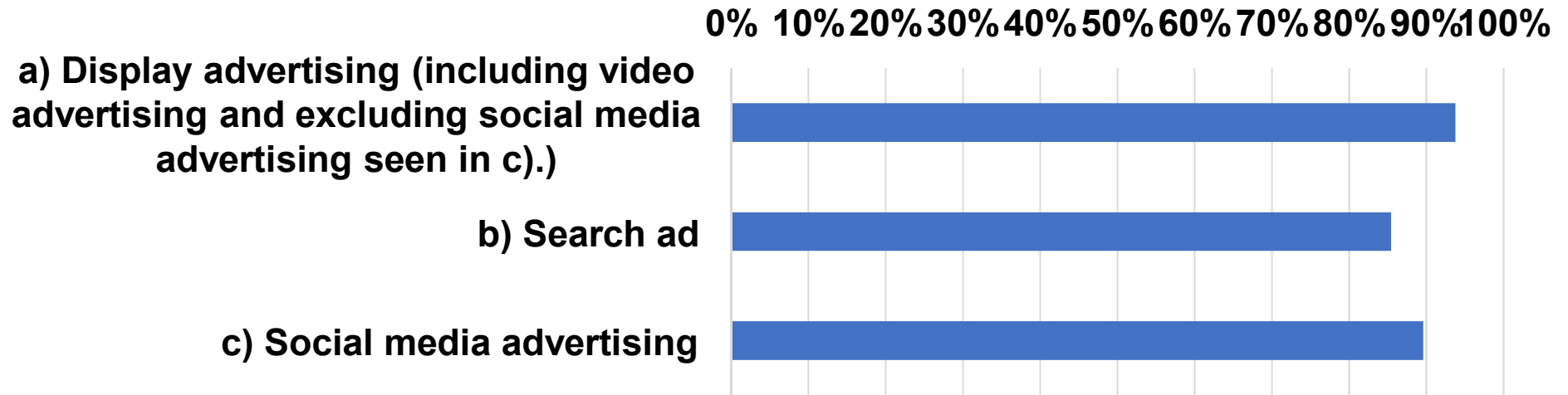
Answers	Number of answers	Ratio (%)
a) 0 yen	1	1.4
b) One yen to one million yen	6	8.2
c) More than one million yen to five million yen	5	6.8
d) More than five million yen to ten million yen	2	2.7
e) More than ten million yen to 50 million yen	7	9.6
f) More than 50 million yen to 100 million yen	7	9.6
g) More than 100 million yen to one billion yen	26	35.6
h) More than one billion yen to ten billion yen	18	24.7
i) More than ten billion yen to 100 billion yen	1	1.4
j) More than 100 billion yen	-	-
Number of respondents	73	100.0

Q6-1. (This question is for Advertisers) How do you expect the ratio of advertising expenses related to digital advertising to transition within overall advertisement expenses at your company in the future? [Select one]



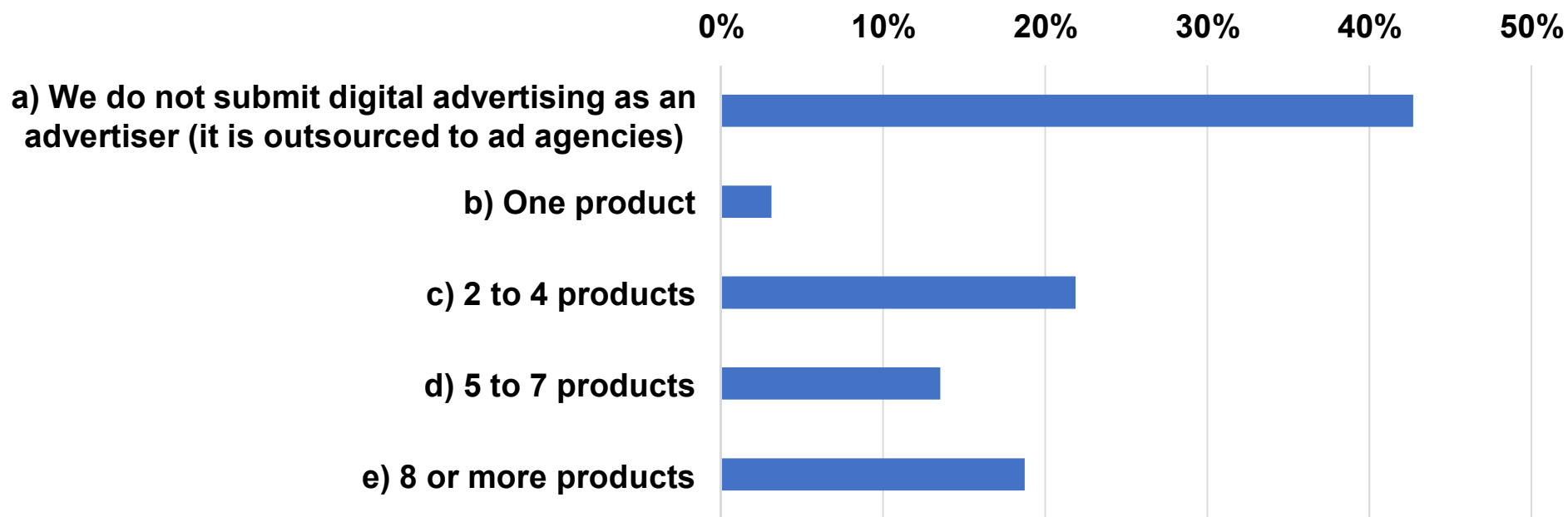
Answers	Number of answers	Ratio (%)
a) It is expected to increase	63	86.3
b) It is expected to decrease	3	4.1
c) No change is expected	7	9.6
Number of respondents	73	100.0

**Q7. Which of the following describes the digital advertising submitted or operated by your company?
Select all applicable advertisements. [Multiple answers accepted]**



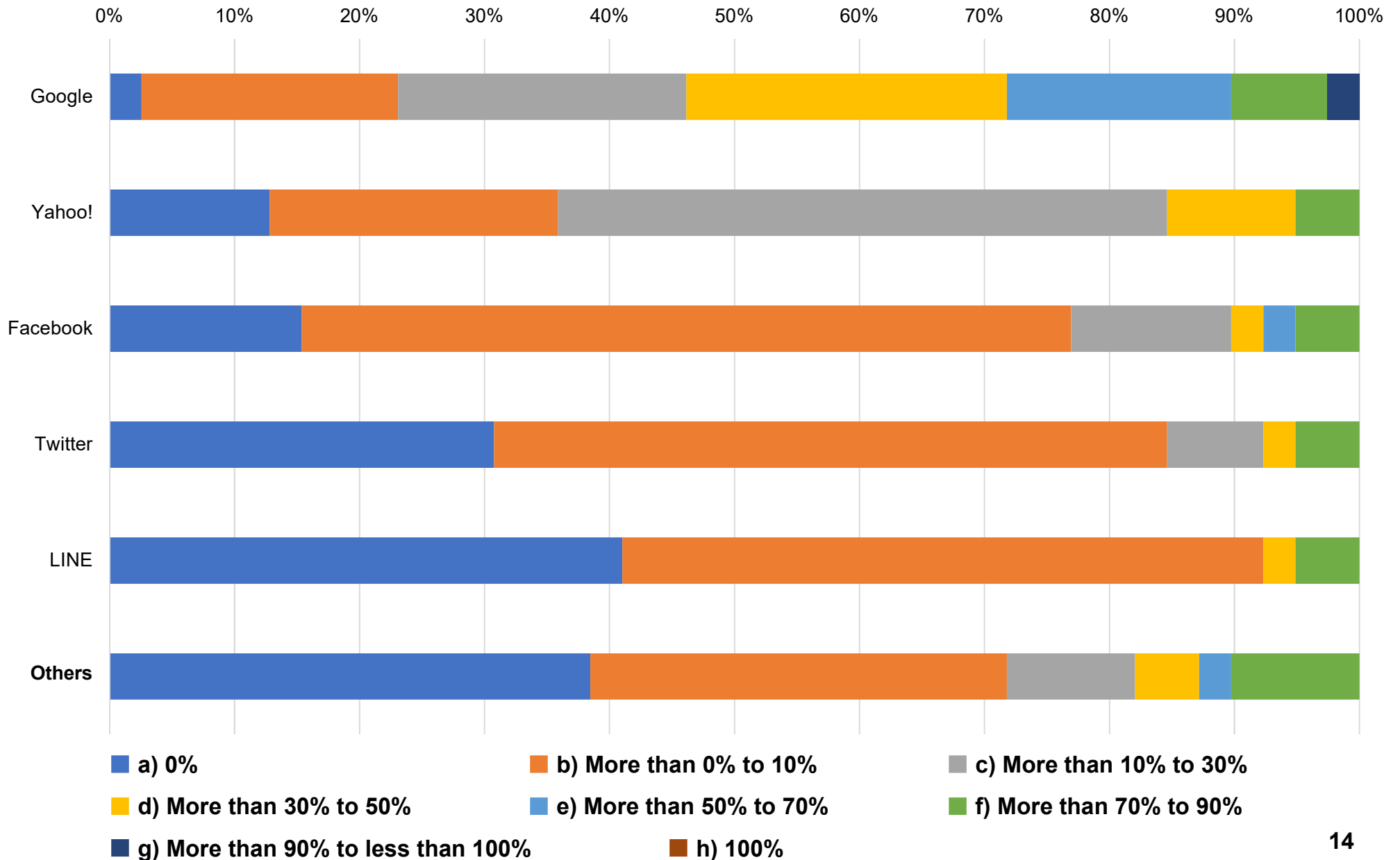
Answers	Number of answers	Ratio (%)
a) Display advertising (including video advertising and excluding social media advertising seen in c.)	90	93.8
b) Search ad	82	85.4
c) Social media advertising	86	89.6
Number of respondents	96	-

Q7-1. Select the number of ad tech service products used to submit or operate digital advertising at your company. [Select one]



Answers	Number of answers	Ratio (%)
a) We do not submit digital advertising as an advertiser (it is outsourced to ad agencies.)	41	42.7
b) One product	3	3.1
c) 2 to 4 products	21	21.9
d) 5 to 7 products	13	13.5
e) 8 or more products	18	18.8
Number of respondents	96	100.0

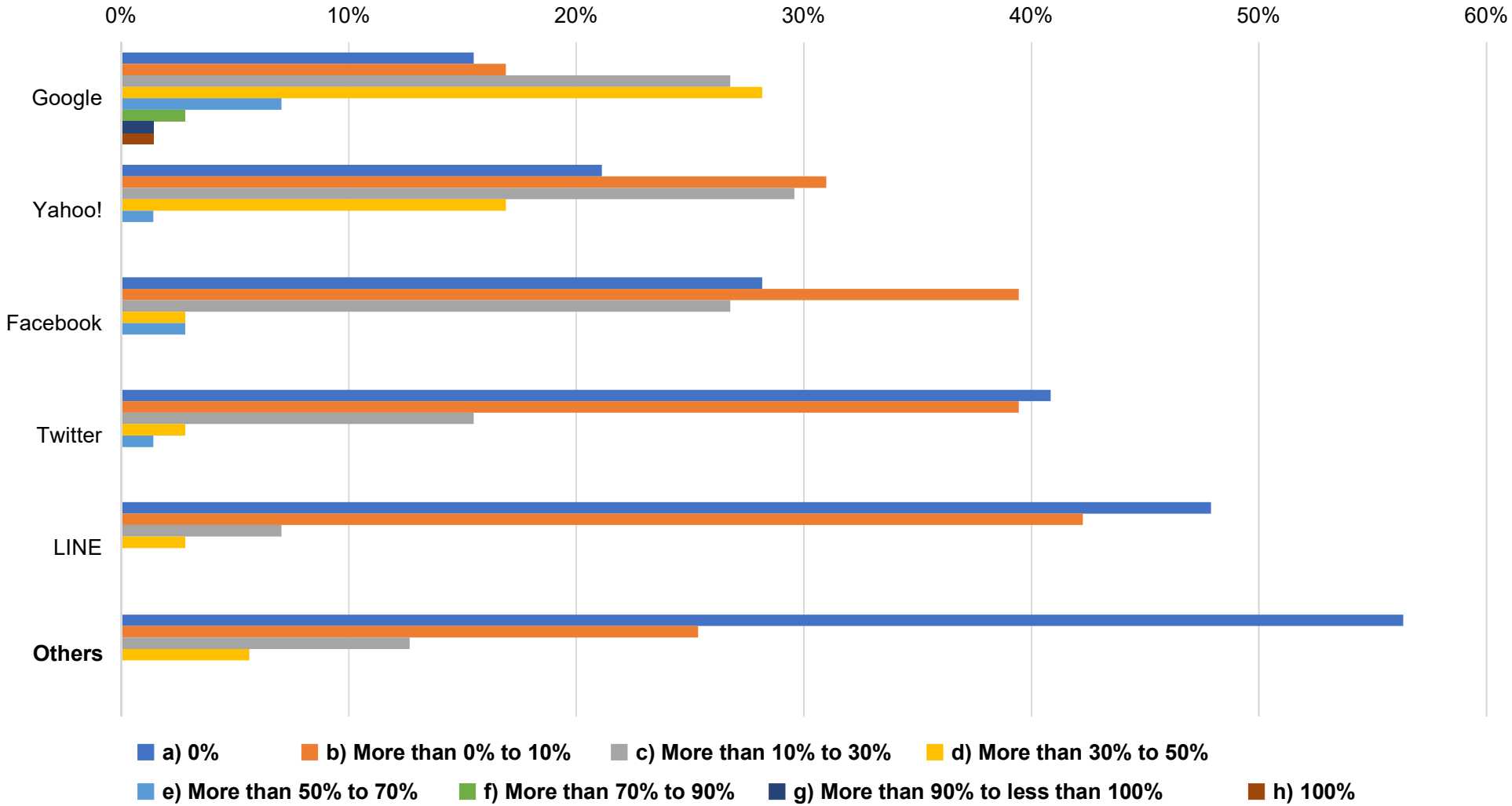
Q8. (This question is for Ad Agencies) What is the ratio of revenue from transactions with business partners in your overall digital advertising business sales? Please answer the average amount of three recent fiscal years per business partner. (a rough estimate is acceptable)[Select one]



Q8. (This question is for Ad Agencies) What is the ratio of revenue from transactions with business partners in your overall digital advertising business sales? Please answer the average amount of three recent fiscal years per business partner. (a rough estimate is acceptable) [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) 0%	1	2.6	5	12.8	6	15.4	12	30.8	16	41.0	15	38.5
b) More than 0% to 10%	8	20.5	9	23.1	24	61.5	21	53.8	20	51.3	13	33.3
c) More than 10% to 30%	9	23.1	19	48.7	5	12.8	3	7.7	-	-	4	10.3
d) More than 30% to 50%	10	25.6	4	10.3	1	2.6	1	2.6	1	2.6	2	5.1
e) More than 50% to 70%	7	17.9	-	-	1	2.6	-	-	-	-	1	2.6
f) More than 70% to 90%	3	7.7	2	5.1	2	5.1	2	5.1	2	5.1	4	10.3
g) More than 90% to less than 100%	1	2.6	-	-	-	-	-	-	-	-	-	-
h) 100%	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	39	100.0	39	100.0	39	100.0	39	100.0	39	100.0	39	100.0

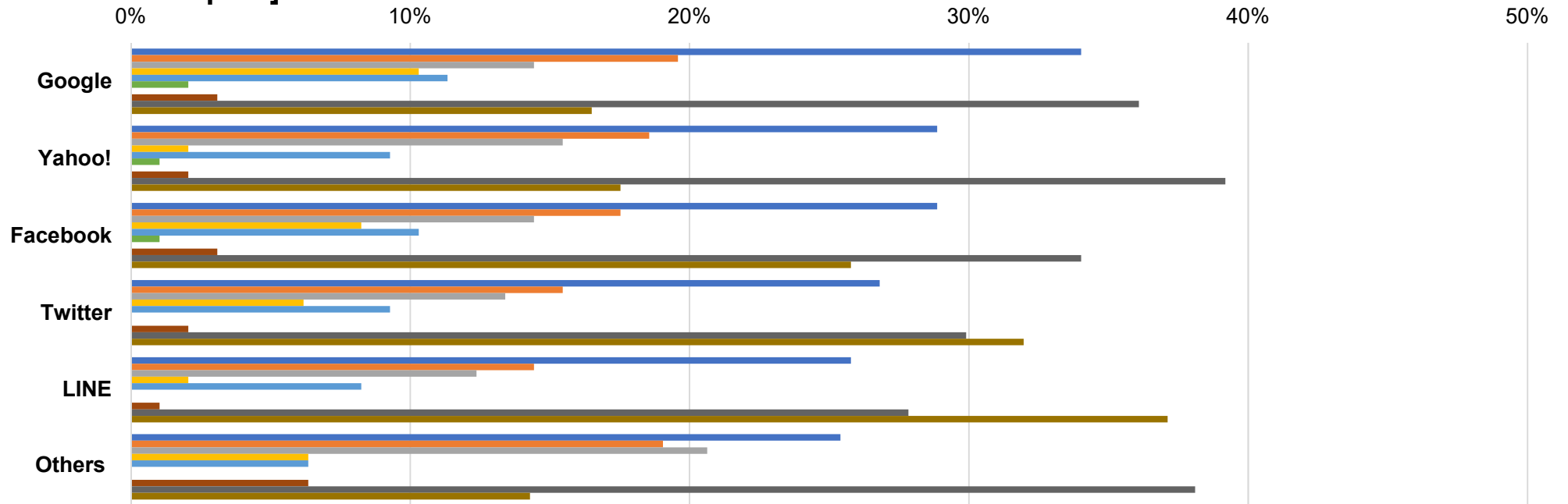
Q8-1. (This question is for Advertisers) What is the ratio of expenditure to each business partner for advertising expenses related to digital advertising in your company? Please answer the average amount of three recent fiscal years per business partner. (a rough estimate is acceptable) [Select one]



Q8-1. (This question is for Advertisers) What is the ratio of expenditure to each business partner for advertising expenses related to digital advertising in your company? Please answer the average amount of three recent fiscal years per business partner. (a rough estimate is acceptable) [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) 0%	11	15.5	15	21.1	20	28.2	29	40.8	34	47.9	40	56.3
b) More than 0% to 10%	12	16.9	22	31.0	28	39.4	28	39.4	30	42.3	18	25.4
c) More than 10% to 30%	19	26.8	21	29.6	19	26.8	11	15.5	5	7.0	9	12.7
d) More than 30% to 50%	20	28.2	12	16.9	2	2.8	2	2.8	2	2.8	4	5.6
e) More than 50% to 70%	5	7.0	1	1.4	2	2.8	1	1.4	-	-	-	-
f) More than 70% to 90%	2	2.8	-	-	-	-	-	-	-	-	-	-
g) More than 90% to less than 100%	1	1.4	-	-	-	-	-	-	-	-	-	-
h) 100%	1	1.4	-	-	-	-	-	-	-	-	-	-
Number of respondents	71	100.0	71	100.0	71	100.0	71	100.0	71	100.0	71	100.0

Q9. (This question is for Ad Agencies or Advertisers who directly do business with digital platform operators.) When directly doing business with digital platform operators, do contracts for ad tech services offered by the said digital platform operator contain stipulations as seen below? [Multiple answers accepted]

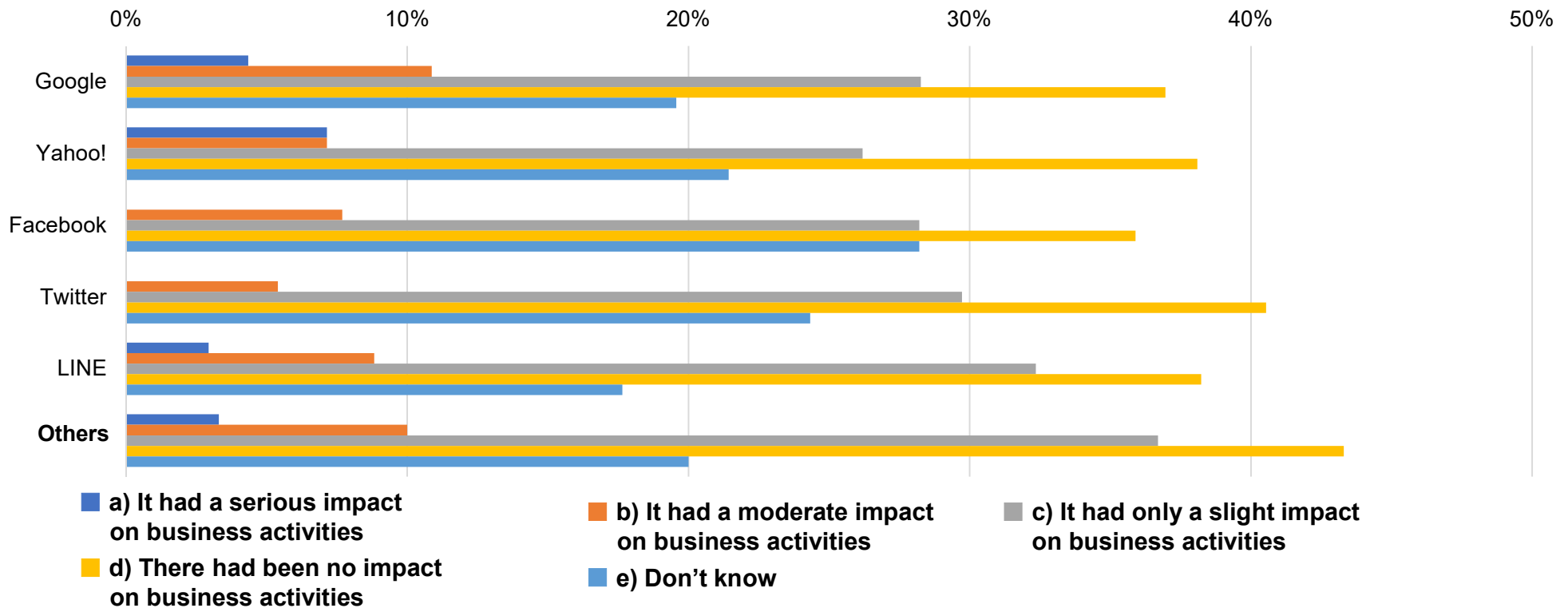


- a) **Contracts are uniform and cannot be changed based on negotiation**
- b) **The said digital platform operators can change contract terms on a discretionary basis**
- c) **Digital platform operators can stop providing their service on a discretionary basis**
- d) **Even if the contract is between two domestic businesses, jurisdiction (such as exclusive court jurisdiction) is established overseas**
- e) **There is no liability or limited liability for any interruption of services (including system failures) of ad tech services offered by the said digital platform operators**
- f) **Compensation for damage can only be claimed from the said digital platform operators (on a one-way basis)**
- g) **Only the said digital platform operator can audit your company system (on a one-way basis)**
- h) **Other (Select this option if there are contract items excluding the above a) to g) which you feel are an issue)**
- i) **There are no issues or problematic provisions as seen above**
- j) **We have never dealt with any of the said digital platform operators**

Q9. (This question is for Ad Agencies or Advertisers who directly do business with digital platform operators.) When directly doing business with digital platform operators, do contracts for ad tech services offered by the said digital platform operator contain stipulations as seen below? [Multiple answers accepted]

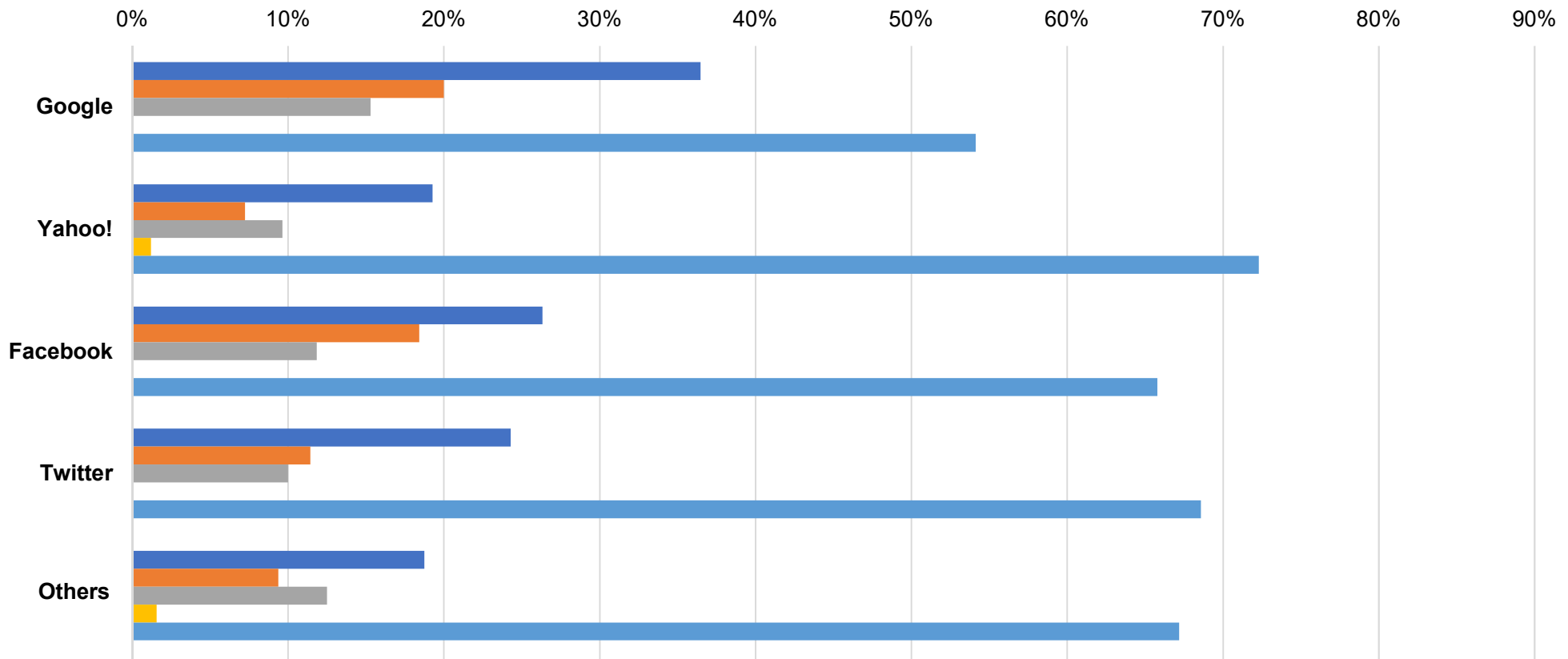
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Contracts are uniform and cannot be changed based on negotiation	33	34.0	28	28.9	28	28.9	26	26.8	25	25.8	16	25.4
b) The said digital platform operators can change contract terms on a discretionary basis	19	19.6	18	18.6	17	17.5	15	15.5	14	14.4	12	19.0
c) Digital platform operators can stop providing their service on a discretionary basis	14	14.4	15	15.5	14	14.4	13	13.4	12	12.4	13	20.6
d) Even if the contract is between two domestic businesses, jurisdiction (such as exclusive court jurisdiction) is established overseas	10	10.3	2	2.1	8	8.2	6	6.2	2	2.1	4	6.3
e) There is no liability or limited liability for any interruption of services (including system failures) of ad tech services offered by the said digital platform operators	11	11.3	9	9.3	10	10.3	9	9.3	8	8.2	4	6.3
f) Compensation for damage can only be claimed from the said digital platform operators (on a one-way basis)	2	2.1	1	1.0	1	1.0	-	-	-	-	-	-
g) Only the said digital platform operator can audit your company system (on a one-way basis)	-	-	-	-	-	-	-	-	-	-	-	-
h) Other (Select this option if there are contract items excluding the above a) to g) which you feel are an issue)	3	3.1	2	2.1	3	3.1	2	2.1	1	1.0	4	6.3
i) There are no issues or problematic provisions as seen above	35	36.1	38	39.2	33	34.0	29	29.9	27	27.8	24	38.1
j) We have never dealt with any of the said digital platform operators	16	16.5	17	17.5	25	25.8	31	32.0	36	37.1	9	14.3
Number of respondents	97	-	97	-	97	-	97	-	97	-	63	-

**Q9-2. (For those who answered a) to h) at Q9) How does the contract impact your business activities?
[Select one]**



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	2	4.3	3	7.1	-	-	-	-	1	2.9	1	3.3
b) It had a moderate impact on business activities	5	10.9	3	7.1	3	7.7	2	5.4	3	8.8	3	10.0
c) It had only a slight impact on business activities	13	28.3	11	26.2	11	28.2	11	29.7	11	32.4	11	36.7
d) There had been no impact on business activities	17	37.0	16	38.1	14	35.9	15	40.5	13	38.2	13	43.3
e) Don't know	9	19.6	9	21.4	11	28.2	9	24.3	6	17.6	6	20.0
Number of respondents	46	100.0	42	100.0	39	100.0	37	100.0	34	100.0	34	100.0

Q11. When using the ad tech services provided by digital platform operators, did you experience any of the following changes with transition to the said ad tech service system? [Multiple answers accepted]

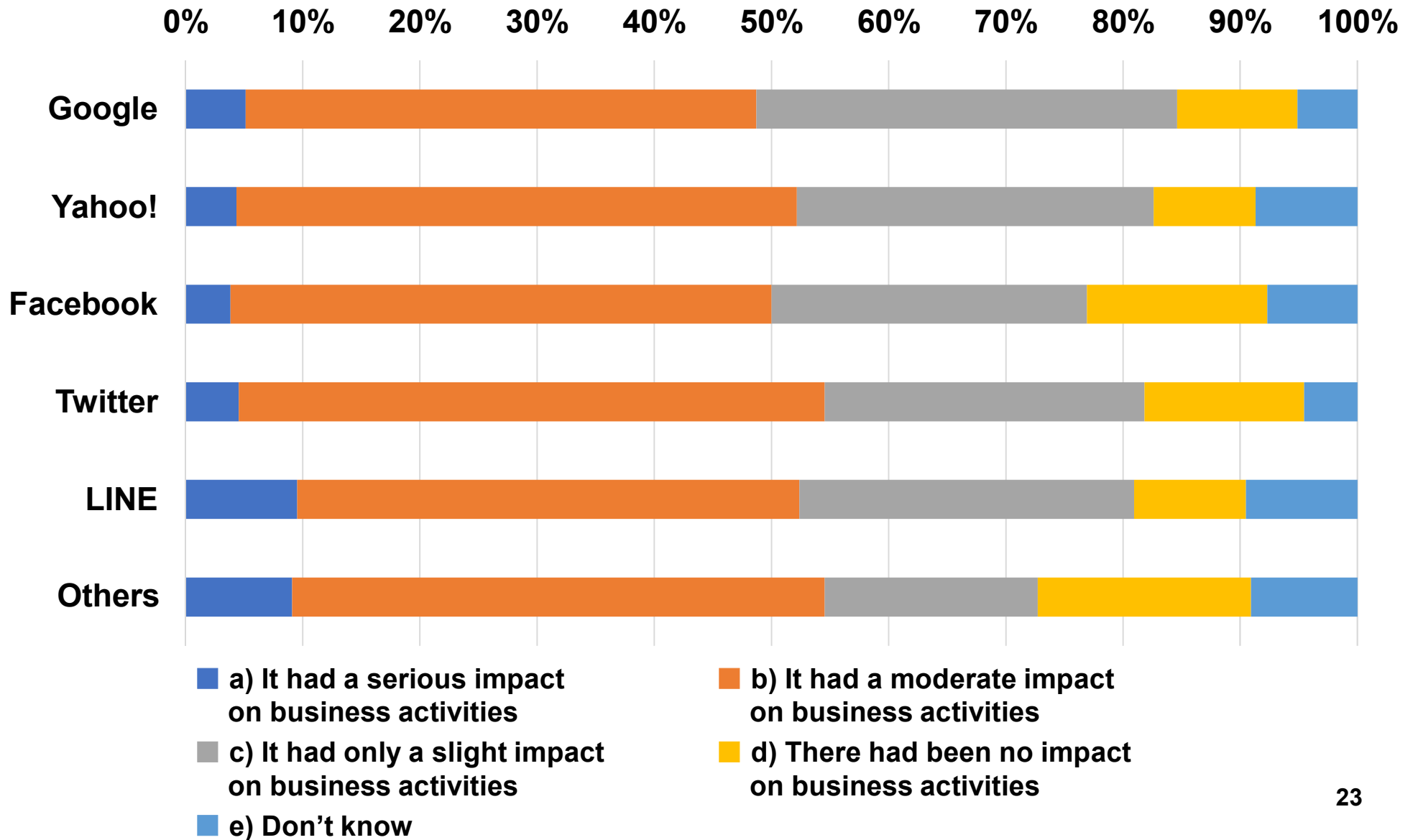


- a) **We struggled to correspond to the sudden system change**
- b) **Reasons for the system change were not clearly stated**
- c) **Company wishes were not reflected in the system change**
- d) **Other (Select this option if there are issues in system change excluding the above a) to c))**
- e) **There are no issues, and no problems as seen above**

Q11. When using the ad tech services provided by digital platform operators, did you experience any of the following changes with transition to the said ad tech service system? [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We struggled to correspond to the sudden system change	31	36.5	16	19.3	20	26.3	17	24.3	12	18.8	8	14.0
b) Reasons for the system change were not clearly stated	17	20.0	6	7.2	14	18.4	8	11.4	6	9.4	4	7.0
c) Company wishes were not reflected in the system change	13	15.3	8	9.6	9	11.8	7	10.0	8	12.5	4	7.0
d) Other (Select this option if there are issues in system change excluding the above a) to c))	-	-	1	1.2	-	-	-	-	1	1.6	1	1.8
e) There are no issues, and no problems as seen above	46	54.1	60	72.3	50	65.8	48	68.6	43	67.2	46	80.7
Number of respondents	85	-	83	-	76	-	70	-	64	-	57	-

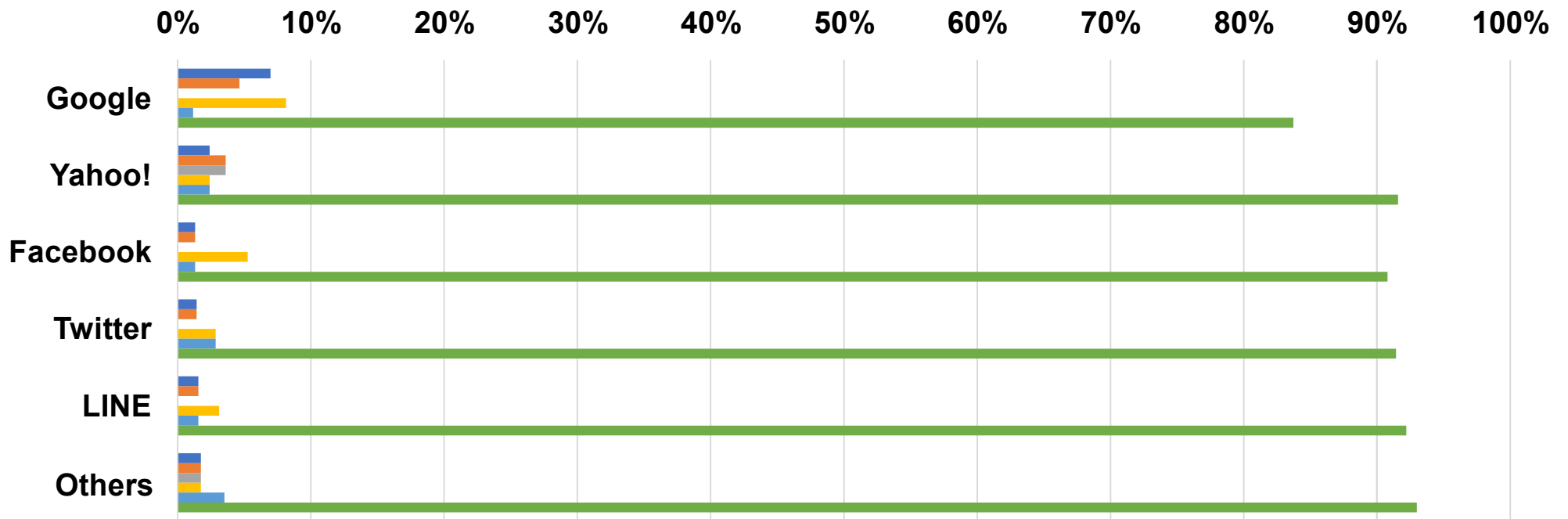
**Q11-2. (For those who answered a) to d) at Q11) How did this impact your business activities?
[Select one]**



**Q11-2. (For those who answered a) to d) at Q11) How did this impact your business activities?
[Select one]**

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	2	5.1	1	4.3	1	3.8	1	4.5	2	9.5	1	9.1
b) It had a moderate impact on business activities	17	43.6	11	47.8	12	46.2	11	50.0	9	42.9	5	45.5
c) It had only a slight impact on business activities	14	35.9	7	30.4	7	26.9	6	27.3	6	28.6	2	18.2
d) There had been no impact on business activities	4	10.3	2	8.7	4	15.4	3	13.6	2	9.5	2	18.2
e) Don't know	2	5.1	2	8.7	2	7.7	1	4.5	2	9.5	1	9.1
Number of respondents	39	100.0	23	100.0	26	100.0	22	100.0	21	100.0	11	100.0

Q12. When using the ad tech services provided by digital platform operators, did you experience any of the following? [Multiple answers accepted]

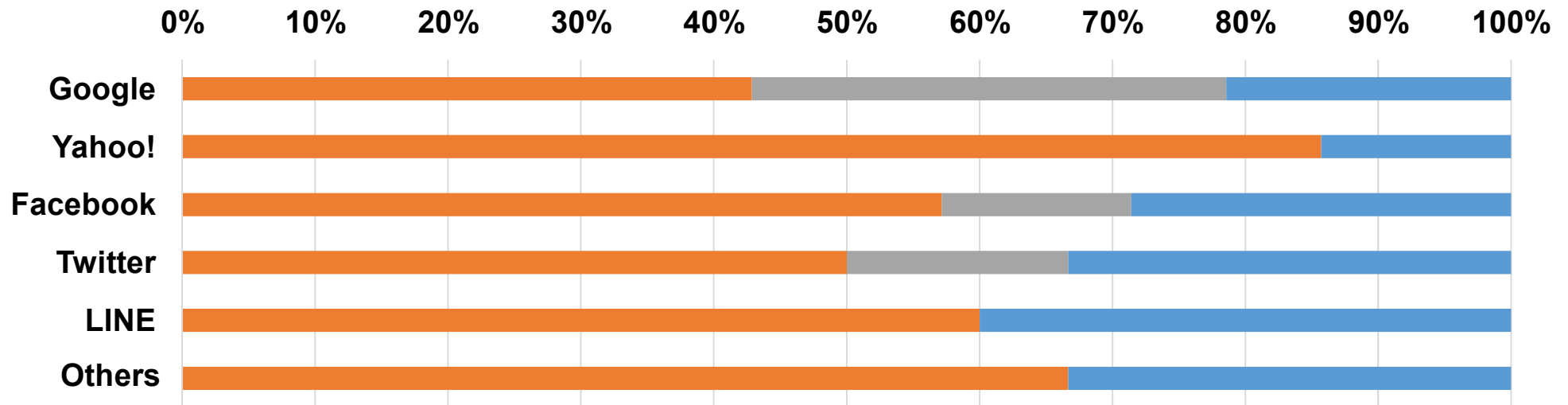


- a) Digital platform operators prohibited use of other third-party services
- b) Staff from the digital platform operators told us not to use third-party services (Explicitly or implicitly)
- c) Consultation to digital platform operators was necessary when using a third-party service that is not an ad tech service provided by them
- d) There was no clear explanation on why an account was suspended
- e) Other (Select this option if there were issues in using third-party services excluding the above a) to d))
- f) There were no issues, and no problems as seen above

Q12. When using the ad tech services provided by digital platform operators, did you experience any of the following? [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Digital platform operators prohibited use of other third-party services	6	7.0	2	2.4	1	1.3	1	1.4	1	1.6	1	1.8
b) Staff from the digital platform operators told us not to use third-party services (Explicitly or implicitly)	4	4.7	3	3.6	1	1.3	1	1.4	1	1.6	1	1.8
c) Consultation to digital platform operators was necessary when using a third-party service that is not an ad tech service provided by them	-	-	3	3.6	-	-	-	-	-	-	1	1.8
d) There was no clear explanation on why an account was suspended	7	8.1	2	2.4	4	5.3	2	2.9	2	3.1	1	1.8
e) Other (Select this option if there were issues in using third-party services excluding the above a) to d))	1	1.2	2	2.4	1	1.3	2	2.9	1	1.6	2	3.5
f) There were no issues, and no problems as seen above	72	83.7	76	91.6	69	90.8	64	91.4	59	92.2	53	93.0
Number of respondents	86	-	83	-	76	-	70	-	64	-	57	-

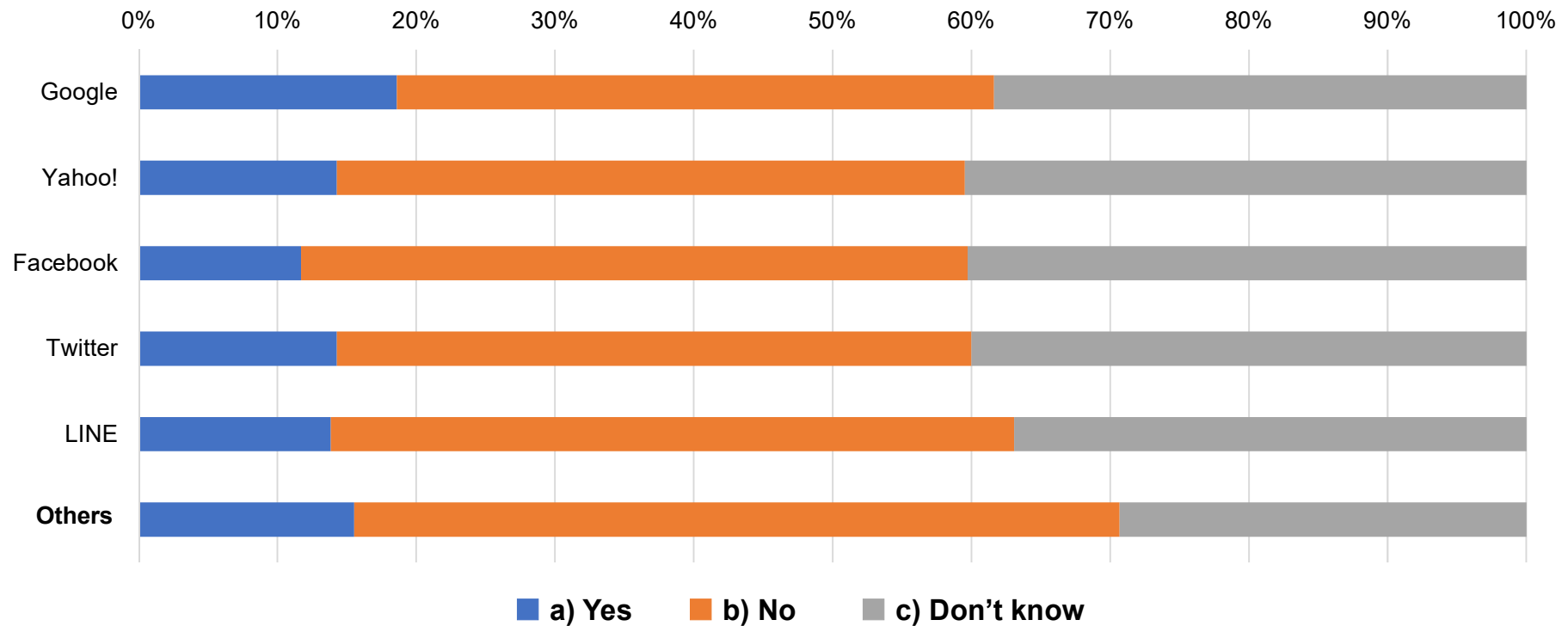
**Q12-2. (For those who answered a) to e) at Q12) How did this impact your business activities?
[Select one]**



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

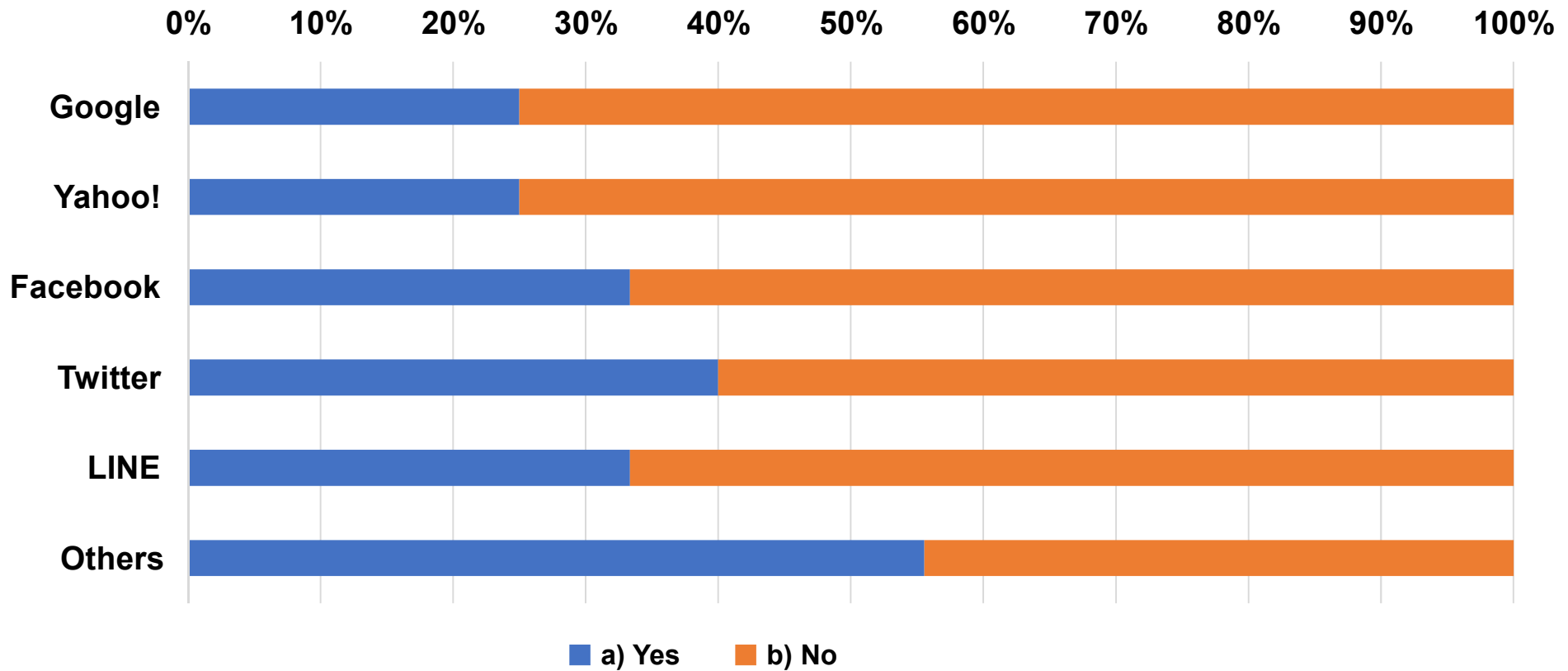
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	6	42.9	6	85.7	4	57.1	3	50.0	3	60.0	2	66.7
c) It had only a slight impact on business activities	5	35.7	-	-	1	14.3	1	16.7	-	-	-	-
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	3	21.4	1	14.3	2	28.6	2	33.3	2	40.0	1	33.3
Number of respondents	14	100.0	7	100.0	7	100.0	6	100.0	5	100.0	3	100.0

Q13. When using the ad tech services provided by digital platform operators to distribute advertisements, was there a case in which your company was not able to distribute advertisements in the wanted inventory, despite bidding at a price your company believed was more than reasonable? [Select one]



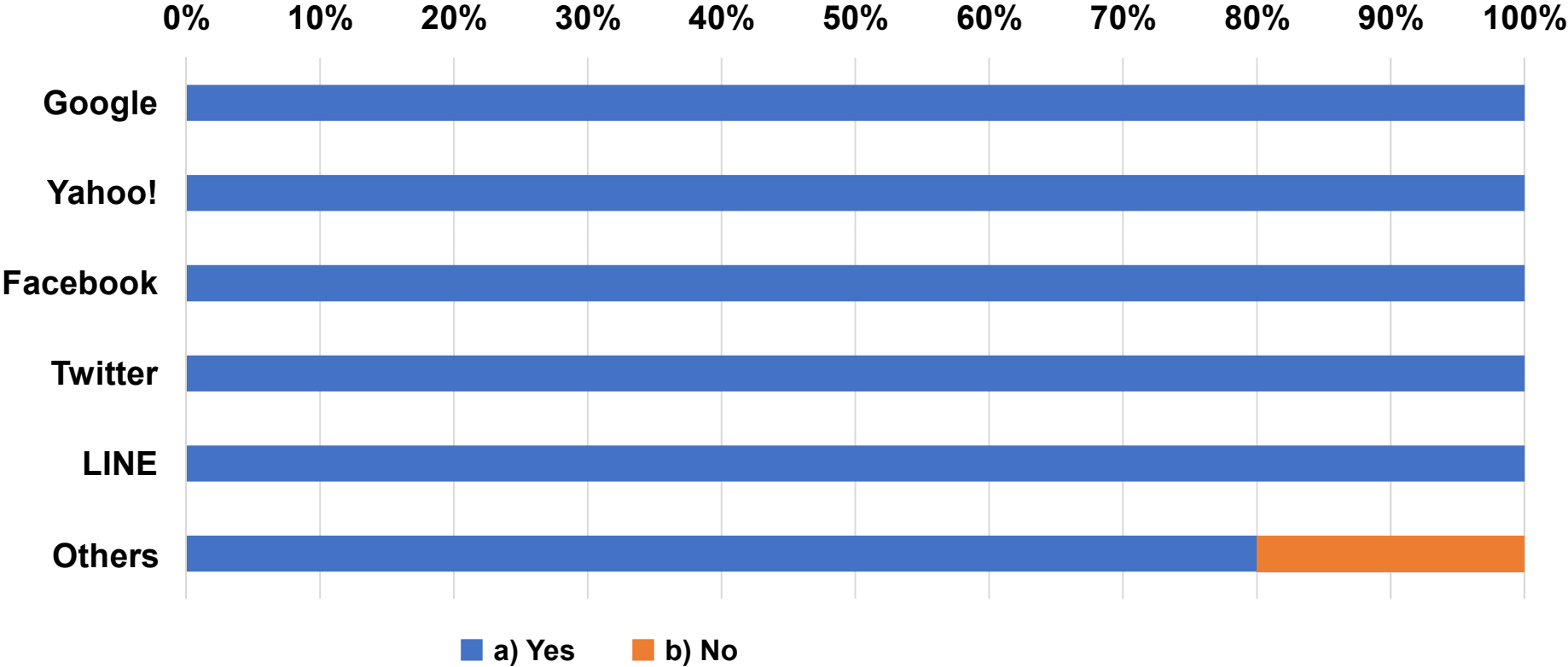
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	16	18.6	12	14.3	9	11.7	10	14.3	9	13.8	9	15.5
b) No	37	43.0	38	45.2	37	48.1	32	45.7	32	49.2	32	55.2
c) Don't know	33	38.4	34	40.5	31	40.3	28	40.0	24	36.9	17	29.3
Number of respondents	86	100.0	84	100.0	77	100.0	70	100.0	65	100.0	58	100.0

Q13-1. (For those who answered “a) Yes” at Q13) Was there an explanation from the said digital platform operator on why the advertisement was not distributed? [Select one]



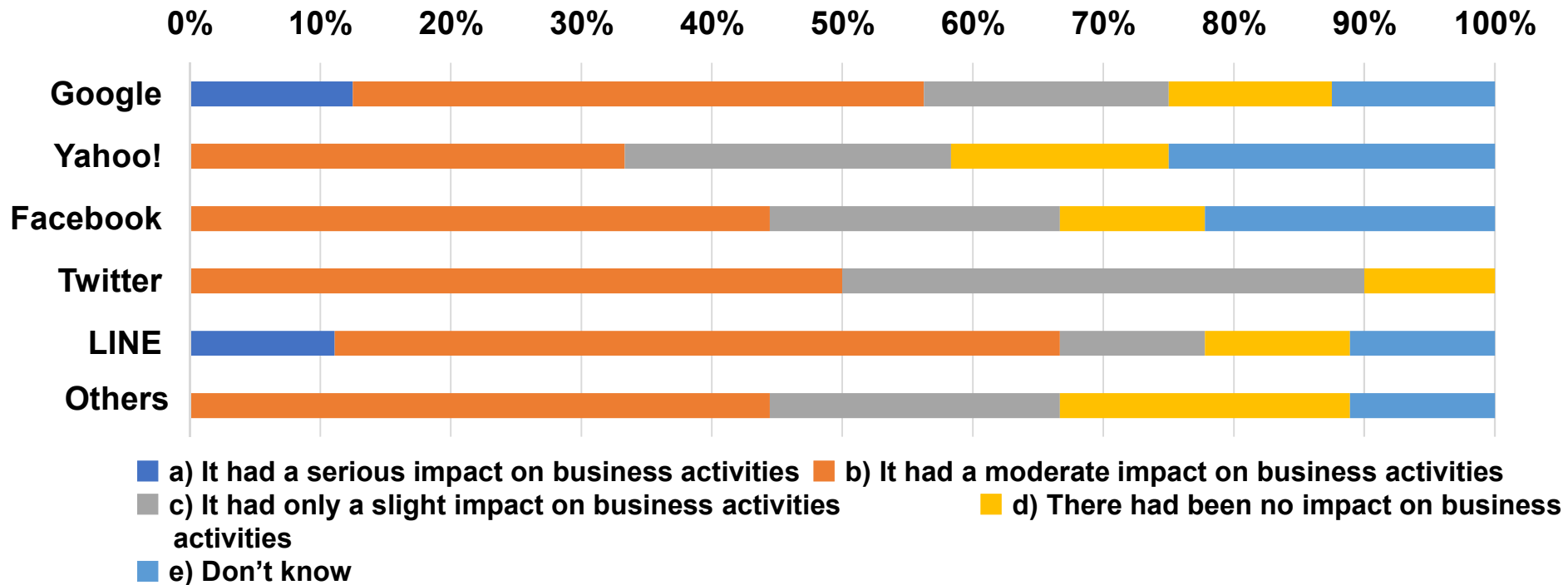
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	4	25.0	3	25.0	3	33.3	4	40.0	3	33.3	5	55.6
b) No	12	75.0	9	75.0	6	66.7	6	60.0	6	66.7	4	44.4
Number of respondents	16	100.0	12	100.0	9	100.0	10	100.0	9	100.0	9	100.0

Q13-1-1. (For those who answered “a) Yes” at Q13-1) Was your company satisfied with the explanation? [Select one]



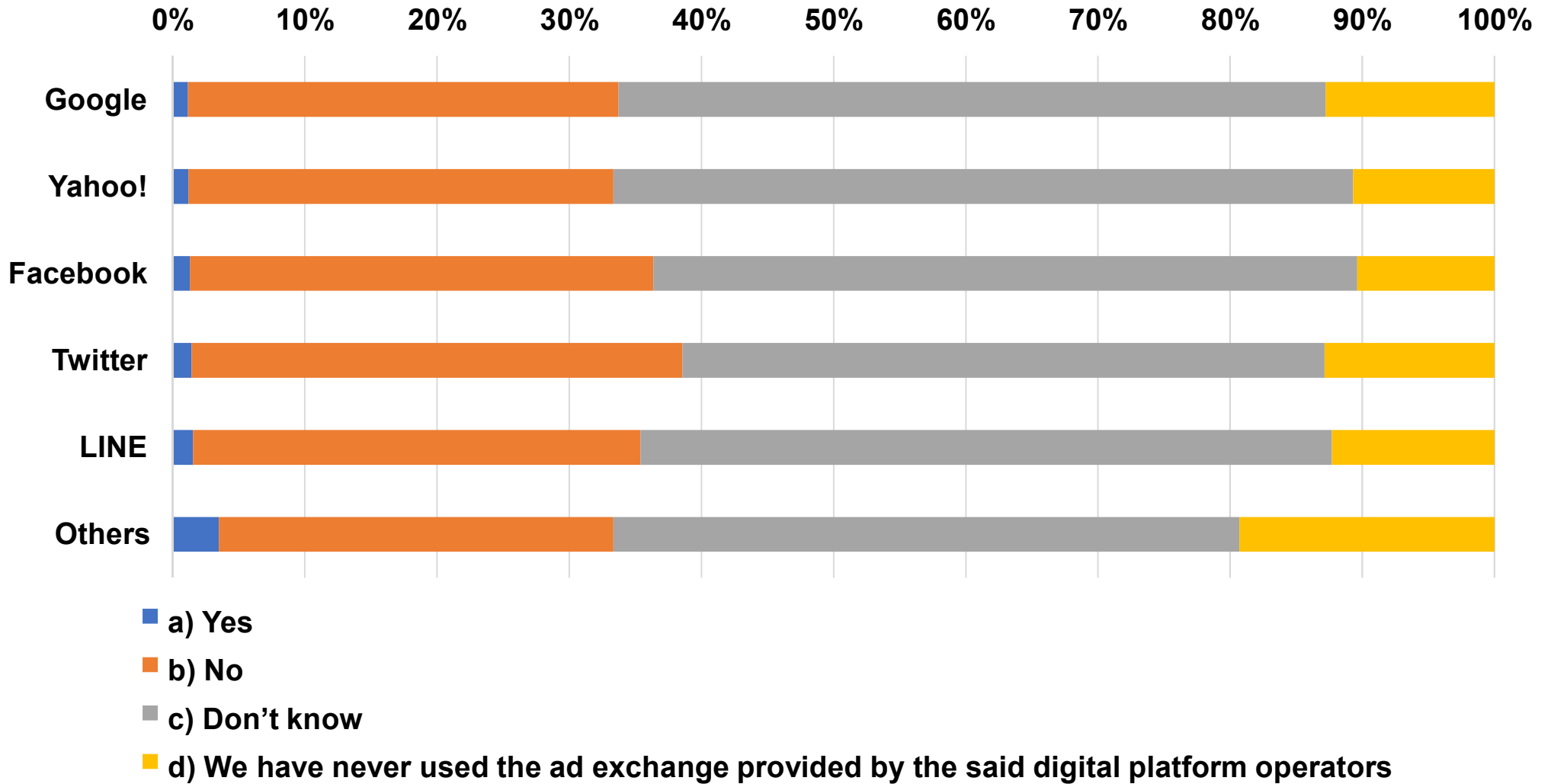
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	4	100.0	3	100.0	3	100.0	4	100.0	3	100.0	4	80.0
b) No	-	-	-	-	-	-	-	-	-	-	1	20.0
Number of respondents	4	100.0	3	100.0	3	100.0	4	100.0	3	100.0	5	100.0

Q13-3. (For those who answered “a) Yes” at Q13) How did being unable to distribute advertisements impact your business activities? [Select one] (*If there were multiple cases, answer the one case that had the most impact on your company.)



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	2	12.5	-	-	-	-	-	-	1	11.1	-	-
b) It had a moderate impact on business activities	7	43.8	4	33.3	4	44.4	5	50.0	5	55.6	4	44.4
c) It had only a slight impact on business activities	3	18.8	3	25.0	2	22.2	4	40.0	1	11.1	2	22.2
d) There had been no impact on business activities	2	12.5	2	16.7	1	11.1	1	10.0	1	11.1	2	22.2
e) Don't know	2	12.5	3	25.0	2	22.2	-	-	1	11.1	1	11.1
Number of respondents	16	100.0	12	100.0	9	100.0	10	100.0	9	100.0	9	100.0

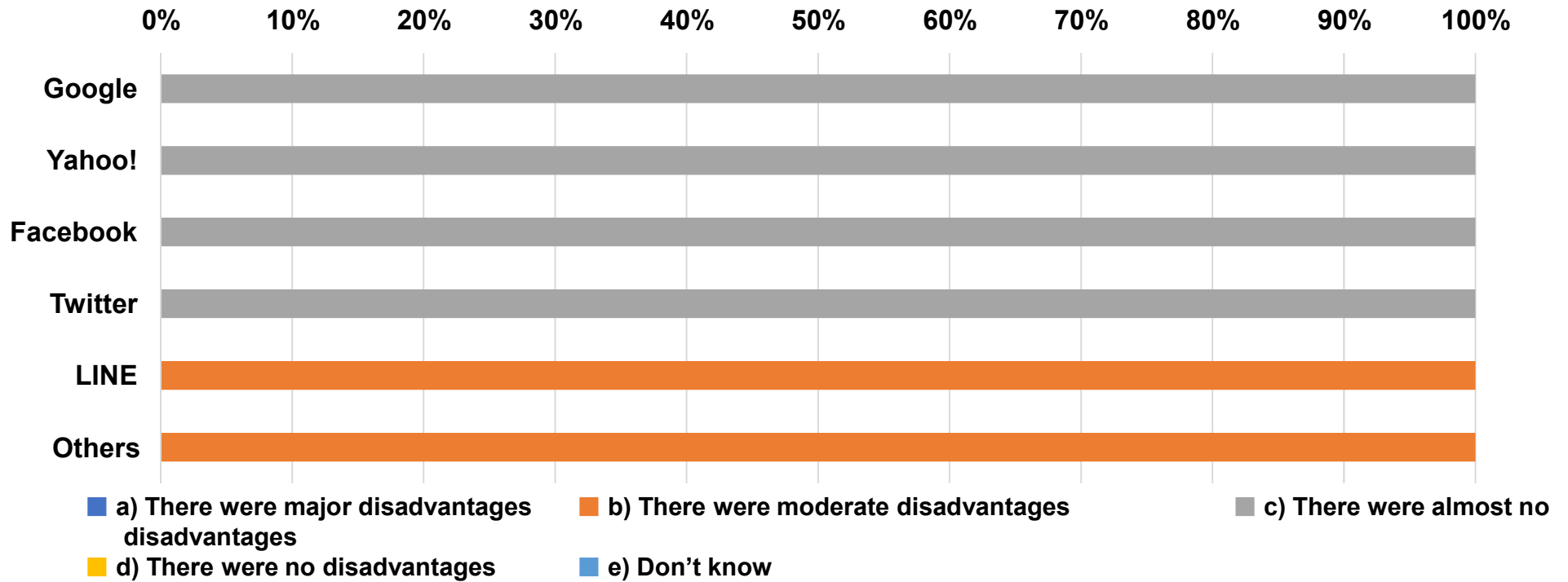
Q14. When an inventory auction is conducted in ad exchanges provided by digital platform operators, have you felt that the said digital platform operators have a grasp on bidding price of other bidders beforehand and use this information in these auctions? [Select one]



Q14. When an inventory auction is conducted for ad exchanges provided by digital platform operators, have you felt that the said digital platform operators have a grasp on bidding price of other bidders beforehand and use this information in these auctions? [Select one]

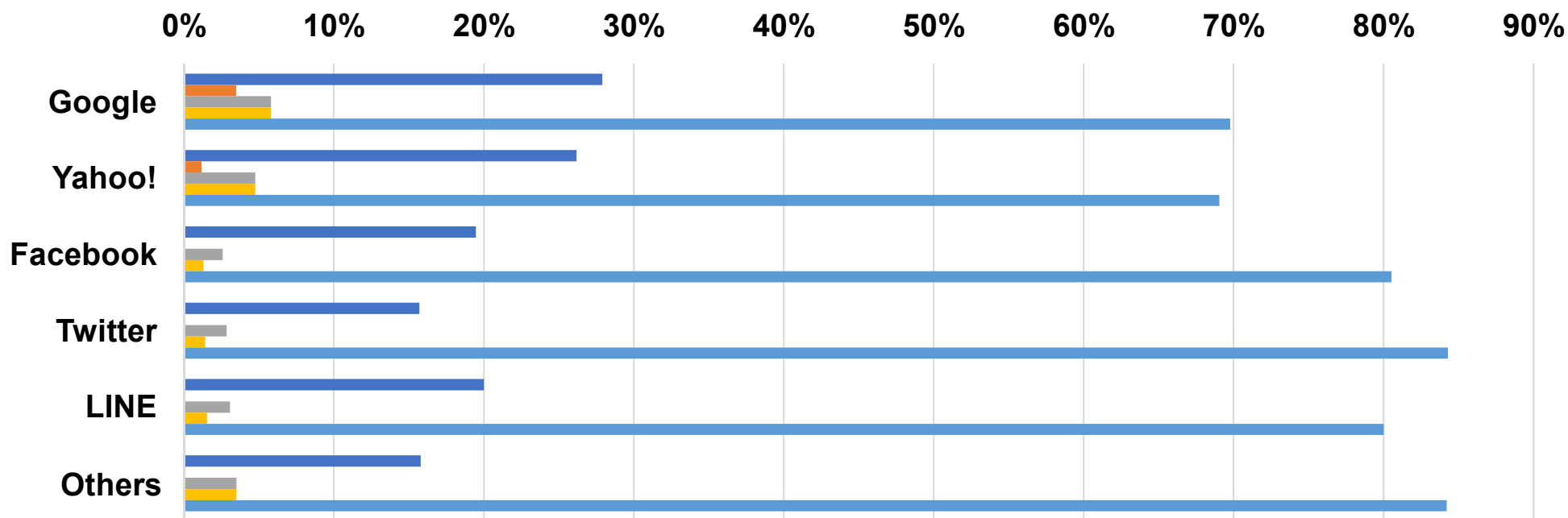
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	1	1.2	1	1.2	1	1.3	1	1.4	1	1.5	2	3.5
b) No	28	32.6	27	32.1	27	35.1	26	37.1	22	33.8	17	29.8
c) Don't know	46	53.5	47	56.0	41	53.2	34	48.6	34	52.3	27	47.4
d) We have never used the ad exchange provided by the said digital platform operators	11	12.8	9	10.7	8	10.4	9	12.9	8	12.3	11	19.3
Number of respondents	86	100.0	84	100.0	77	100.0	70	100.0	65	100.0	57	100.0

Q14-2. (For those who answered “a) Yes” at Q14) Did your company suffer disadvantages due to this activity? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
b) There were moderate disadvantages	-	-	-	-	-	-	-	-	1	100.0	2	100.0
c) There were almost no disadvantages	1	100.0	1	100.0	1	100.0	1	100.0	-	-	-	-
d) There were no disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	1	100.0	1	100.0	1	100.0	1	100.0	1	100.0	2	100.0

Q15. When using the ad tech services provided by digital platform operators to distribute advertisements, were there any issues in advertisement display results (example: the display order for search advertising, or display location for display advertising)? If there were issues, what were the issues? Please select from the following. [Multiple answers accepted]

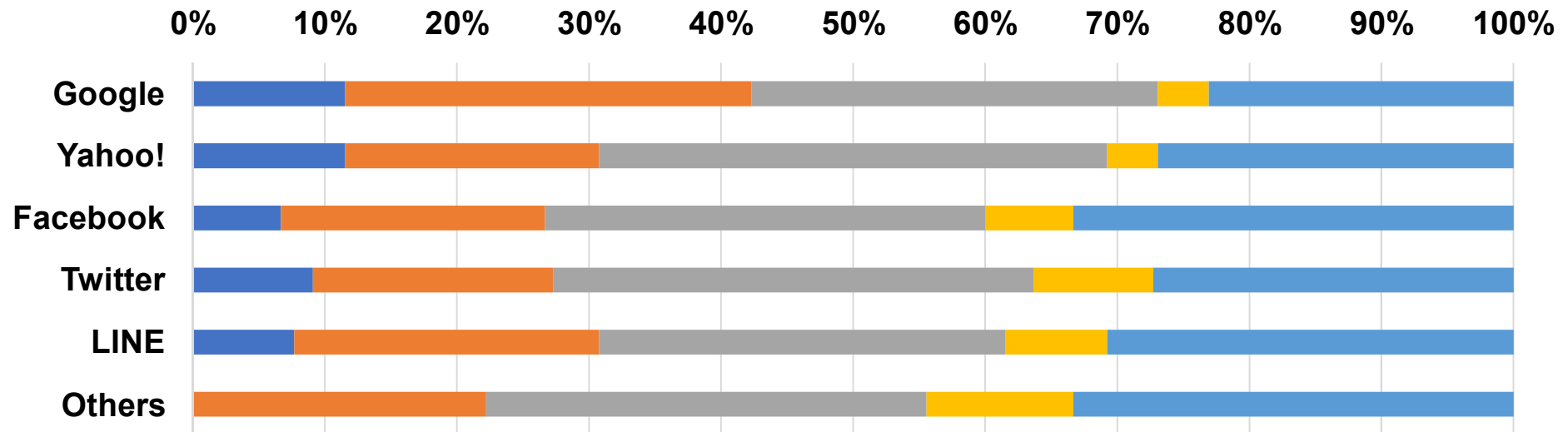


- a) The standards of the display order or location are unclear
- b) Other businesses received more favorable treatment than we did, without any rational reason
- c) Our advertisements were not displayed in prominent locations or orders, despite our company paying a large amount of advertising expenses
- d) Other (Select this option if there are issues in advertisement displays excluding the above a) to c))
- e) There are no issues, and no problems as seen above

Q15. When using the ad tech services provided by digital platform operators to distribute advertisements, were there any issues in advertisement display results (example: the display order for search advertising, or display location for display advertising). If there were issues, what were the issues? Please select from the following. [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) The standards of the display order or location are unclear	24	27.9	22	26.2	15	19.5	11	15.7	13	20.0	9	15.8
b) Other businesses received more favorable treatment than we did, without any rational reason	3	3.5	1	1.2	-	-	-	-	-	-	-	-
c) Our advertisements were not displayed in prominent locations or orders, despite our company paying a large amount of advertising expenses	5	5.8	4	4.8	2	2.6	2	2.9	2	3.1	2	3.5
d) Other (Select this option if there are issues in advertisement displays excluding the above a) to c))	5	5.8	4	4.8	1	1.3	1	1.4	1	1.5	2	3.5
e) There are no issues, and no problems as seen above	60	69.8	58	69.0	62	80.5	59	84.3	52	80.0	48	84.2
Number of respondents	86	-	84	-	77	-	70	-	65	-	57	-

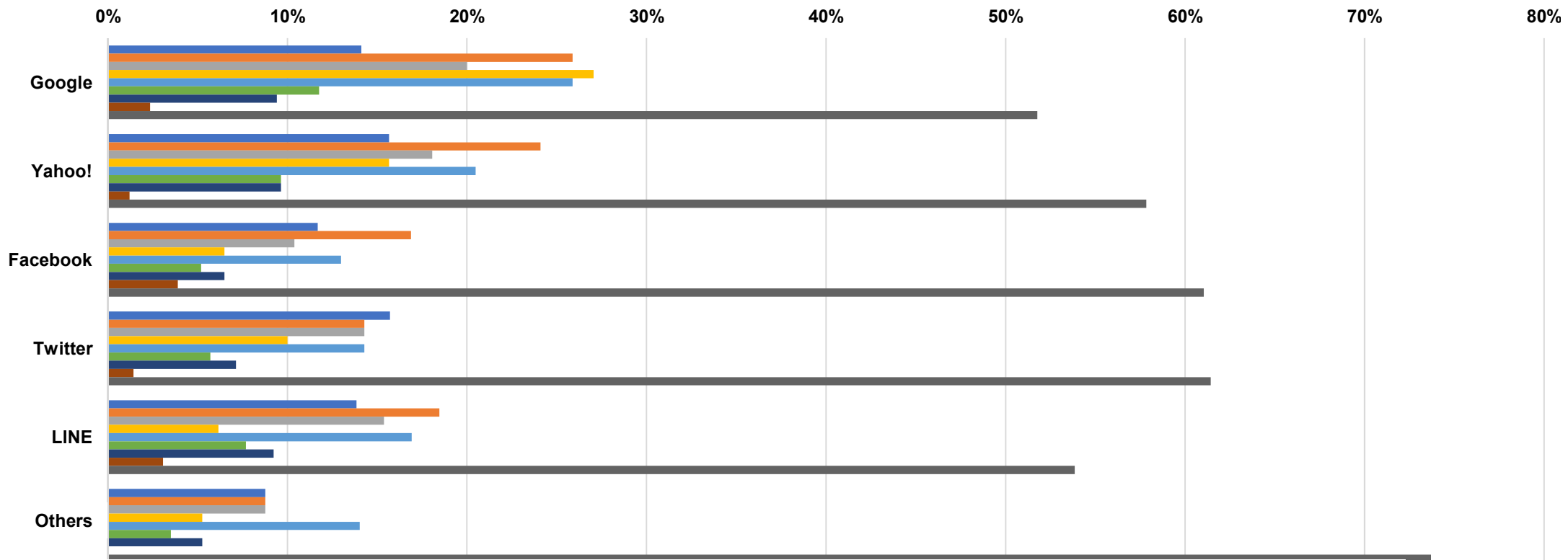
Q15-3. (For those who answered a) to d) at Q15) To what extent these issues in advertisement display impact your business activities? [Select one]



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	3	11.5	3	11.5	1	6.7	1	9.1	1	7.7	-	-
b) It had a moderate impact on business activities	8	30.8	5	19.2	3	20.0	2	18.2	3	23.1	2	22.2
c) It had only a slight impact on business activities	8	30.8	10	38.5	5	33.3	4	36.4	4	30.8	3	33.3
d) There had been no impact on business activities	1	3.8	1	3.8	1	6.7	1	9.1	1	7.7	1	11.1
e) Don't know	6	23.1	7	26.9	5	33.3	3	27.3	4	30.8	3	33.3
Number of respondents	26	100.0	26	100.0	15	100.0	11	100.0	13	100.0	9	100.0

Q16. How do you feel about the information disclosed from the said digital platform operators when using ad tech services to distribute advertisements? Please select from the following. [Multiple answers accepted]

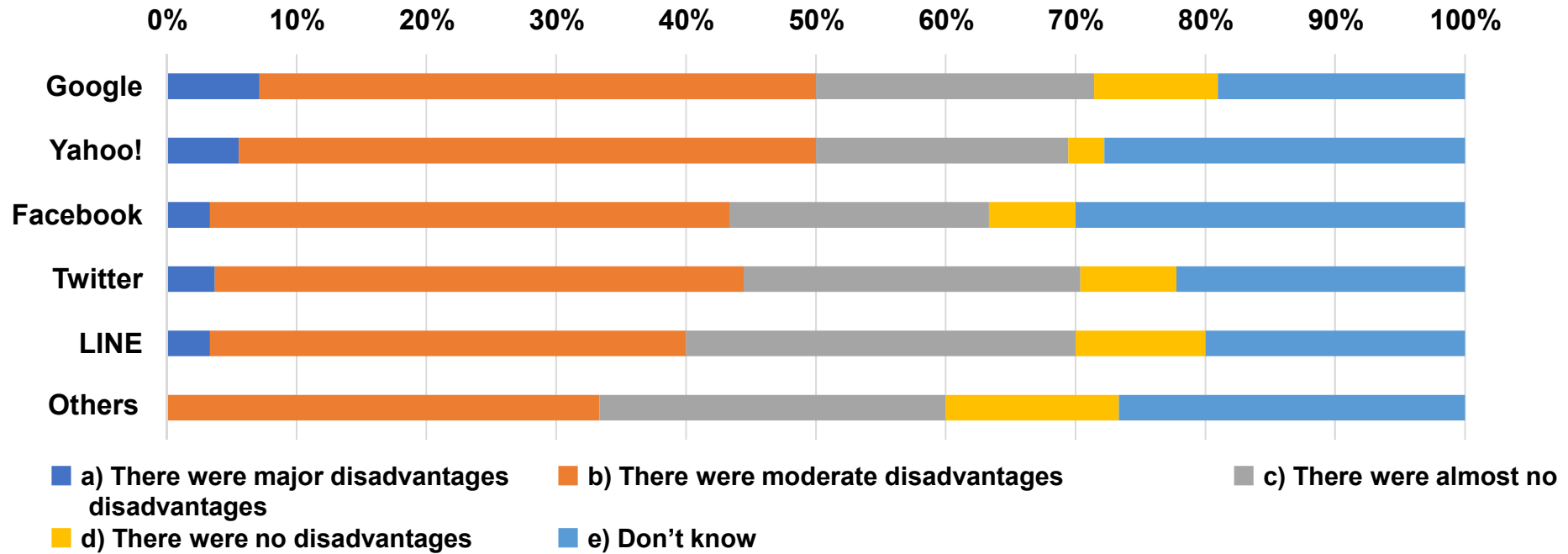


- a) Because there was a lack of disclosure on information related to bidding results, it cannot be taken into consideration in the following bidding as a precedent**
- b) There was a lack of disclosure on ad fraud, making verification impossible**
- c) There was a lack of disclosure on audience data, making applying information to optimize advertisement budgets impossible**
- d) There was a lack of information disclosure on related publishers to which advertisements are distributed, which compromises efforts made to ensure safety (brand safety) from risks when displayed in media, which may damage brand values**
- e) There was a lack of disclosure information related to viewability (whether advertisements are actually seen by users), which deters verification of advertisement efficiency**
- f) There was no detailed breakdown of the fees paid to the said digital platform operators**
- g) Even if disclosed information was adequate, the interface provided by the said digital platform operator was too complex, making it difficult to use necessary information**
- h) Other (Select this option if you feel there were issues in information disclosure excluding the above a) to g))**
- i) We do not have complaints**

Q16. How do you feel about the information disclosed from the said digital platform operators when using ad tech services to distribute advertisements? Please select from the following. [Multiple answers accepted]

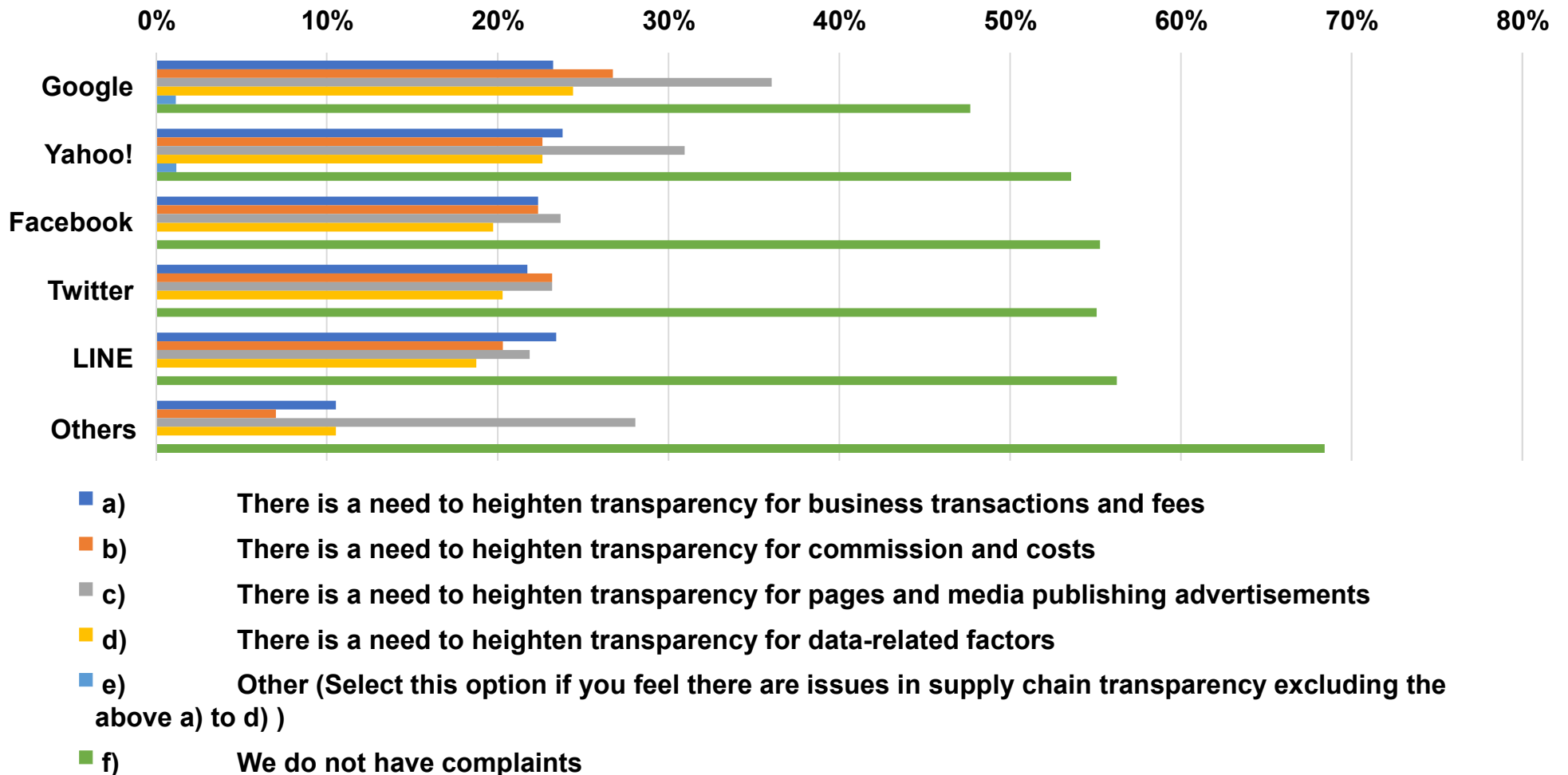
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There was a lack of disclosure on information related to bidding results, making applying information to future bidding impossible	12	14.1	13	15.7	9	11.7	11	15.7	9	13.8	5	8.8
b) There was a lack of disclosure on ad fraud, making verification impossible	22	25.9	20	24.1	13	16.9	10	14.3	12	18.5	5	8.8
c) There was a lack of disclosure on audience data, making applying information to optimize advertisement budgets impossible	17	20.0	15	18.1	8	10.4	10	14.3	10	15.4	5	8.8
d) There was a lack of information disclosure on related publishers to which advertisements are distributed, which compromises efforts made to ensure safety (brand safety) from risks when displayed in media, which may damage brand values	23	27.1	13	15.7	5	6.5	7	10.0	4	6.2	3	5.3
e) There was a lack of disclosure information related to viewability (whether advertisements are actually seen by users), which deters verification of advertisement efficiency	22	25.9	17	20.5	10	13.0	10	14.3	11	16.9	8	14.0
f) There was no detailed breakdown of the fees paid to the said digital platform operators	10	11.8	8	9.6	4	5.2	4	5.7	5	7.7	2	3.5
g) Even if disclosed information was adequate, the interface provided by the said digital platform operator was too complex, making it difficult to use necessary information	8	9.4	8	9.6	5	6.5	5	7.1	6	9.2	3	5.3
h) Other (Select this option if you feel there were issues in information disclosure excluding the above a) to g))	2	2.4	1	1.2	3	3.9	1	1.4	2	3.1	-	-
i) We do not have complaints	44	51.8	48	57.8	47	61.0	43	61.4	35	53.8	42	73.7
Number of respondents	85	-	83	-	77	-	70	-	65	-	57	-

**Q16-2. (For those who answered a) to h) at Q16) Did your company suffer disadvantages due to this?
[Select one]**



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	3	7.1	2	5.6	1	3.3	1	3.7	1	3.3	-	-
b) There were moderate disadvantages	18	42.9	16	44.4	12	40.0	11	40.7	11	36.7	5	33.3
c) There were almost no disadvantages	9	21.4	7	19.4	6	20.0	7	25.9	9	30.0	4	26.7
d) There were no disadvantages	4	9.5	1	2.8	2	6.7	2	7.4	3	10.0	2	13.3
e) Don't know	8	19.0	10	27.8	9	30.0	6	22.2	6	20.0	4	26.7
Number of respondents	42	100.0	36	100.0	30	100.0	27	100.0	30	100.0	15	100.0

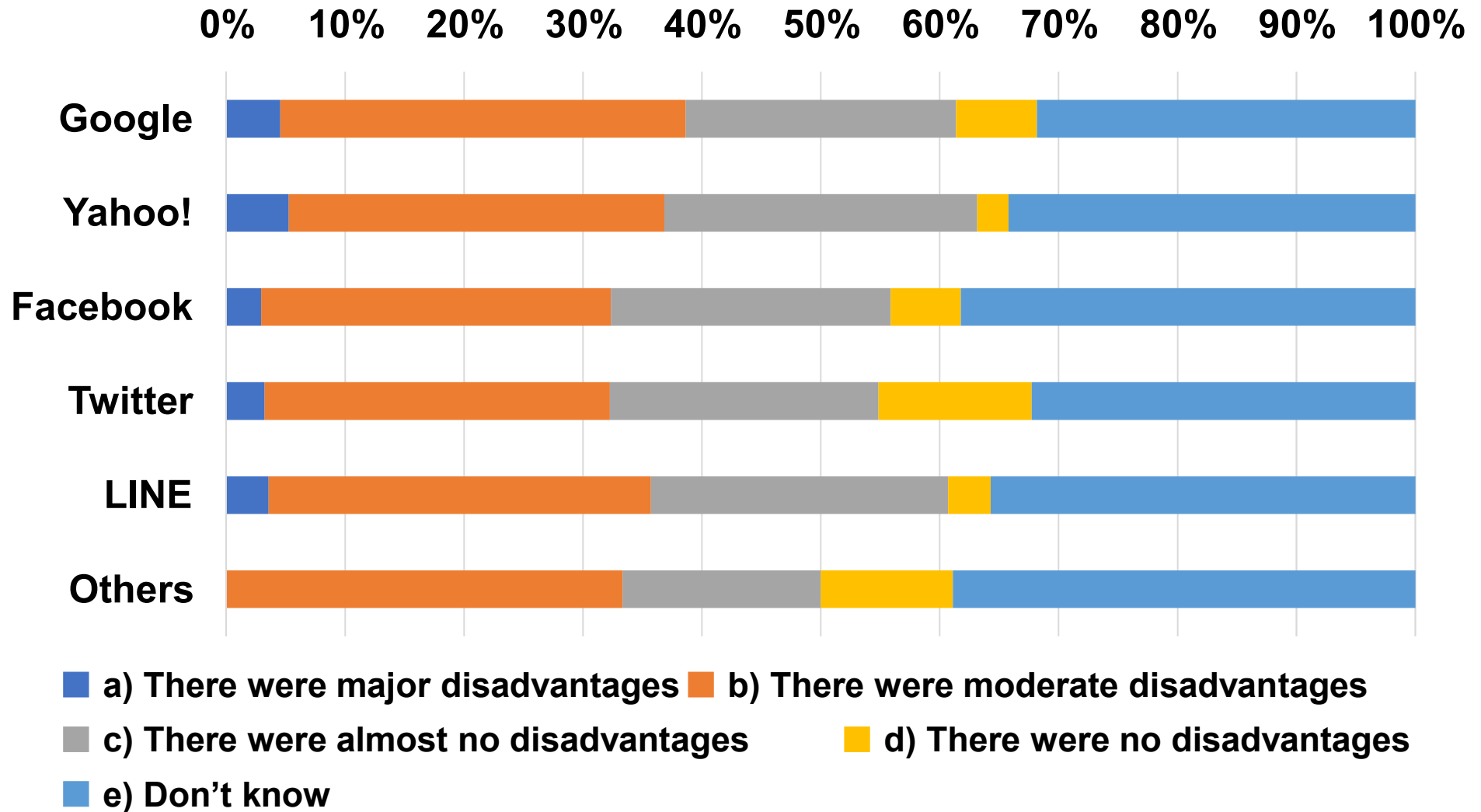
Q17. What are your feelings about the transparency of supply chains (overall connections from advertisers to publishers) of ad tech services provided by digital platform operators which are in use in your company? Please select from the following. [Multiple answers accepted]



Q17. What are your feelings about the transparency of supply chains (overall connections from advertisers to publishers) of ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There is a need to heighten transparency for business transactions and fees	20	23.3	20	23.8	17	22.4	15	21.7	15	23.4	6	10.5
b) There is a need to heighten transparency for commission and costs	23	26.7	19	22.6	17	22.4	16	23.2	13	20.3	4	7.0
c) There is a need to heighten transparency for pages and media publishing advertisements	31	36.0	26	31.0	18	23.7	16	23.2	14	21.9	16	28.1
d) There is a need to heighten transparency for data-related factors	21	24.4	19	22.6	15	19.7	14	20.3	12	18.8	6	10.5
e) Other (Select this option if you feel there are issues in supply chain transparency excluding the above a) to d) .)	1	1.2	1	1.2	-	-	-	-	-	-	-	-
f) We do not have complaints	41	47.7	45	53.6	42	55.3	38	55.1	36	56.3	39	68.4
Number of respondents	86	-	84	-	76	-	69	-	64	-	57	-

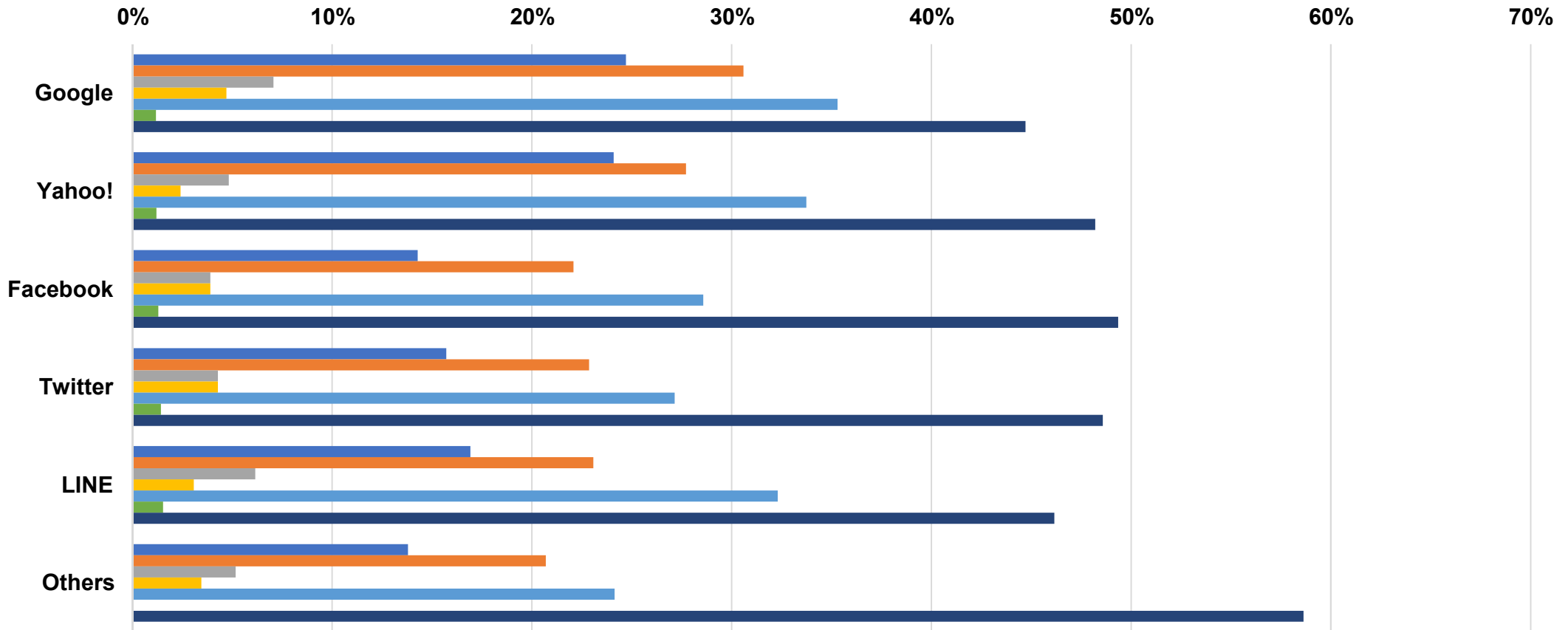
**Q17-2. (For those who answered a) to e) at Q17) Did your company suffer disadvantages due to this?
[Select one]**



Q17-2. (For those who answered a) to e) at Q17) Did your company suffer disadvantages due to this? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	2	4.5	2	5.3	1	2.9	1	3.2	1	3.6	-	-
b) There were moderate disadvantages	15	34.1	12	31.6	10	29.4	9	29.0	9	32.1	6	33.3
c) There were almost no disadvantages	10	22.7	10	26.3	8	23.5	7	22.6	7	25.0	3	16.7
d) There were no disadvantages	3	6.8	1	2.6	2	5.9	4	12.9	1	3.6	2	11.1
e) Don't know	14	31.8	13	34.2	13	38.2	10	32.3	10	35.7	7	38.9
Number of respondents	44	100.0	38	100.0	34	100.0	31	100.0	28	100.0	18	100.0

Q18. What are your feelings about the viewability (whether advertisements are actually seen by users) of ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

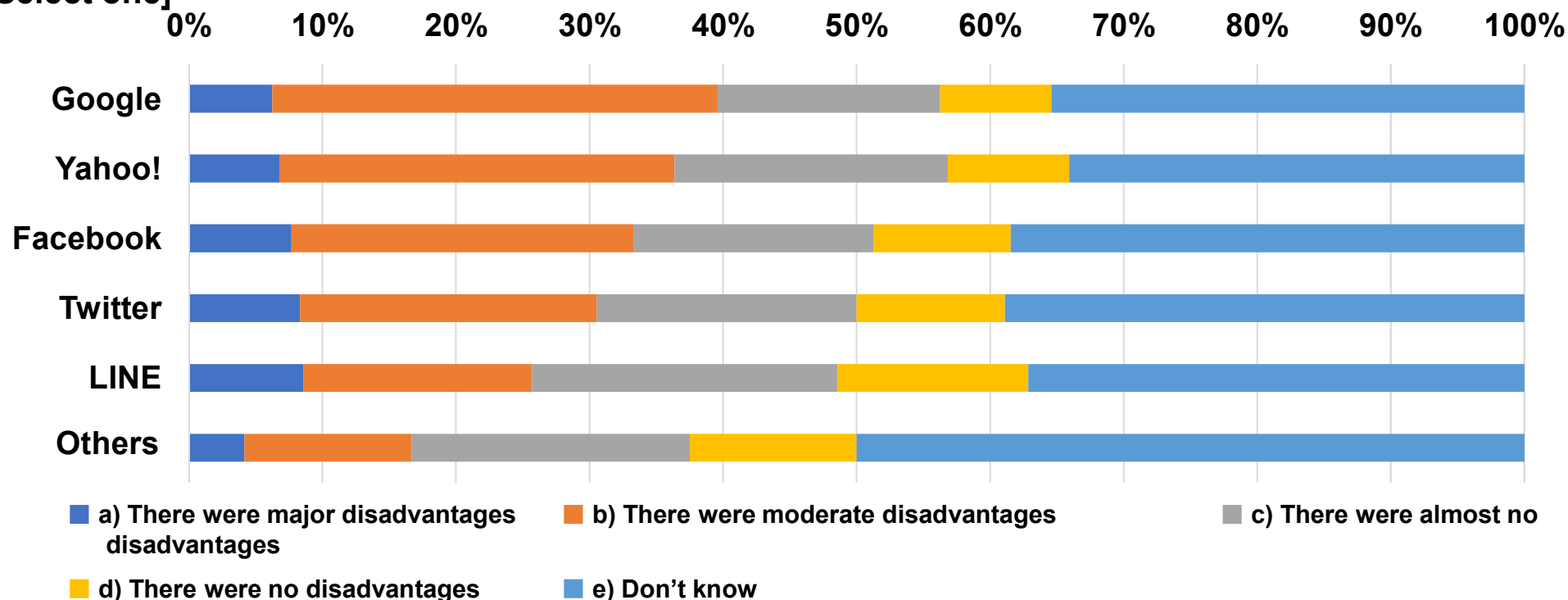


- a) There was no accurate monitoring of viewability levels
- b) There was no regular information disclosure of viewability levels
- c) Viewability did not reach our desired levels
- d) Japan's level of viewability is low when compared to overseas countries
- e) There should be third-party verification/measurements of viewability levels
- f) Other (Select this option if you feel there are issues in viewability excluding the above a) to e))
- g) We do not have complaints

Q18. What are your feelings about the viewability (whether advertisements are actually seen by users) of ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

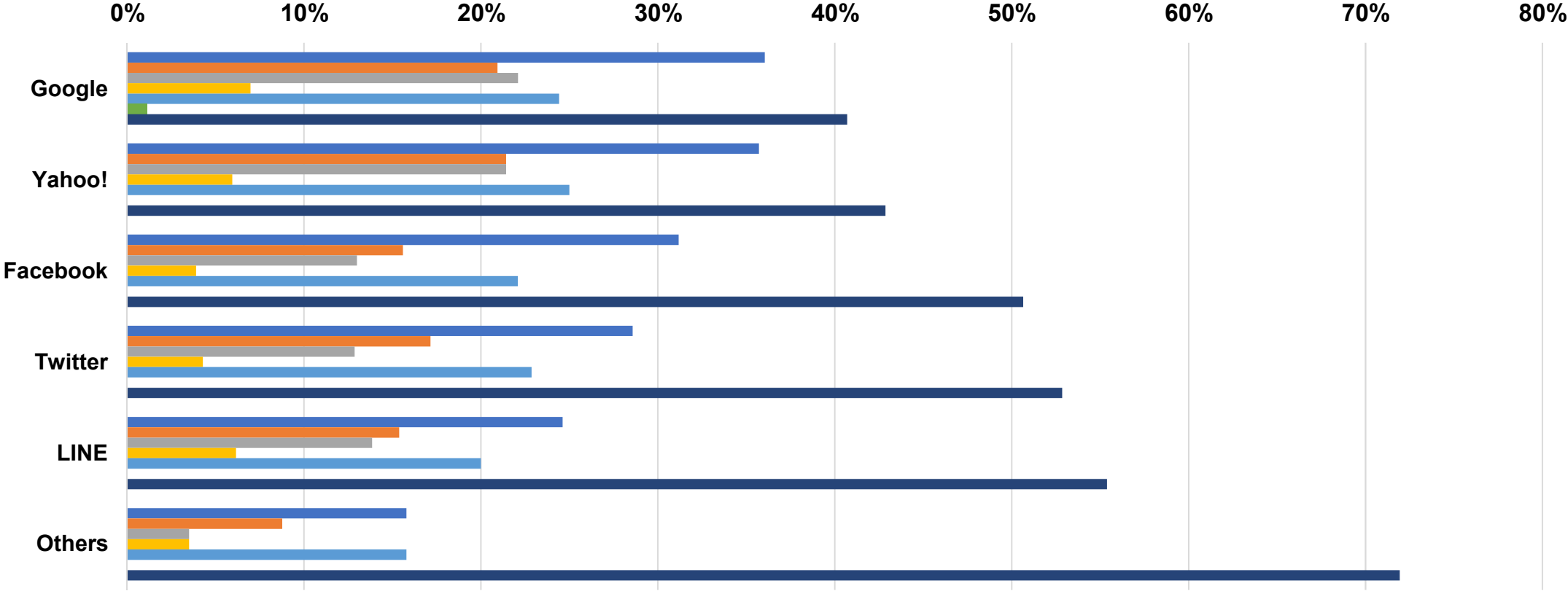
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There was no accurate monitoring of viewability levels	21	24.7	20	24.1	11	14.3	11	15.7	11	16.9	8	13.8
b) There was no regular information disclosure of viewability levels	26	30.6	23	27.7	17	22.1	16	22.9	15	23.1	12	20.7
c) Viewability did not reach our desired levels	6	7.1	4	4.8	3	3.9	3	4.3	4	6.2	3	5.2
d) Japan's level of viewability is low when compared to overseas countries	4	4.7	2	2.4	3	3.9	3	4.3	2	3.1	2	3.4
e) There should be third-party verification/measurements of viewability levels	30	35.3	28	33.7	22	28.6	19	27.1	21	32.3	14	24.1
f) Other (Select this option if you feel there are issues in viewability excluding the above a) to e) .)	1	1.2	1	1.2	1	1.3	1	1.4	1	1.5	-	-
g) We do not have complaints	38	44.7	40	48.2	38	49.4	34	48.6	30	46.2	34	58.6
Number of respondents	85	-	83	-	77	-	70	-	65	-	58	-

**Q18-2. (For those who answered a) to f) at Q18) Did your company suffer disadvantages due to this?
[Select one]**



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	3	6.3	3	6.8	3	7.7	3	8.3	3	8.6	1	4.2
b) There were moderate disadvantages	16	33.3	13	29.5	10	25.6	8	22.2	6	17.1	3	12.5
c) There were almost no disadvantages	8	16.7	9	20.5	7	17.9	7	19.4	8	22.9	5	20.8
d) There were no disadvantages	4	8.3	4	9.1	4	10.3	4	11.1	5	14.3	3	12.5
e) Don't know	17	35.4	15	34.1	15	38.5	14	38.9	13	37.1	12	50.0
Number of respondents	48	100.0	44	100.0	39	100.0	36	100.0	35	100.0	24	100.0

Q19. What are your feelings about measures taken against ad fraud (generation of invalid impressions and clicks generated by bots to earn unjust ad income) by ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

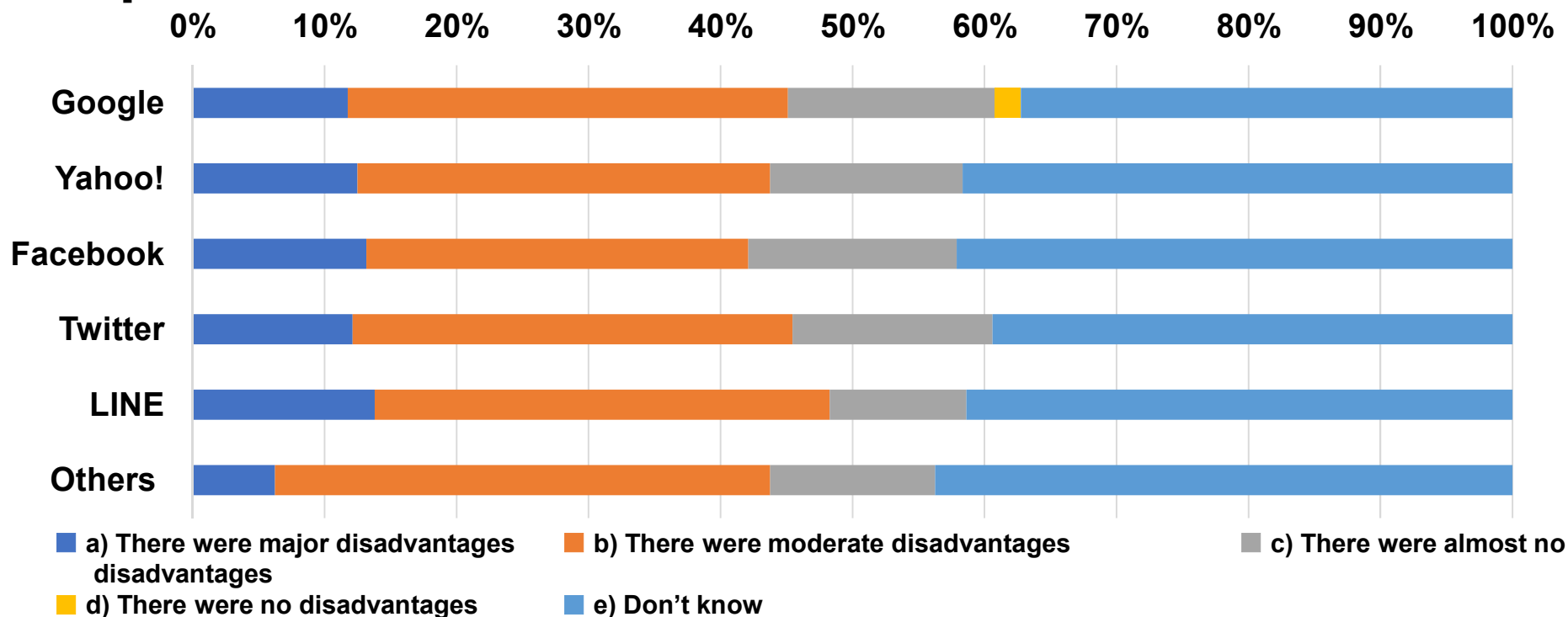


- a) There was a lack of information disclosure on ad fraud
- b) There was insufficient verification of traffic to uncover ad fraud
- c) There was lack of preventive measures for ad fraud
- d) Swift refunds were not made when ad fraud is discovered
- e) Digital platform operators should refund fees related to invalid traffic
- f) Other (Select this option if you feel there were issues in ad fraud excluding the above a) to e))
- g) We do not have complaints

Q19. What are your feelings about measures taken against ad fraud (generation of invalid impressions and clicks generated by bots to earn unjust ad income) by ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

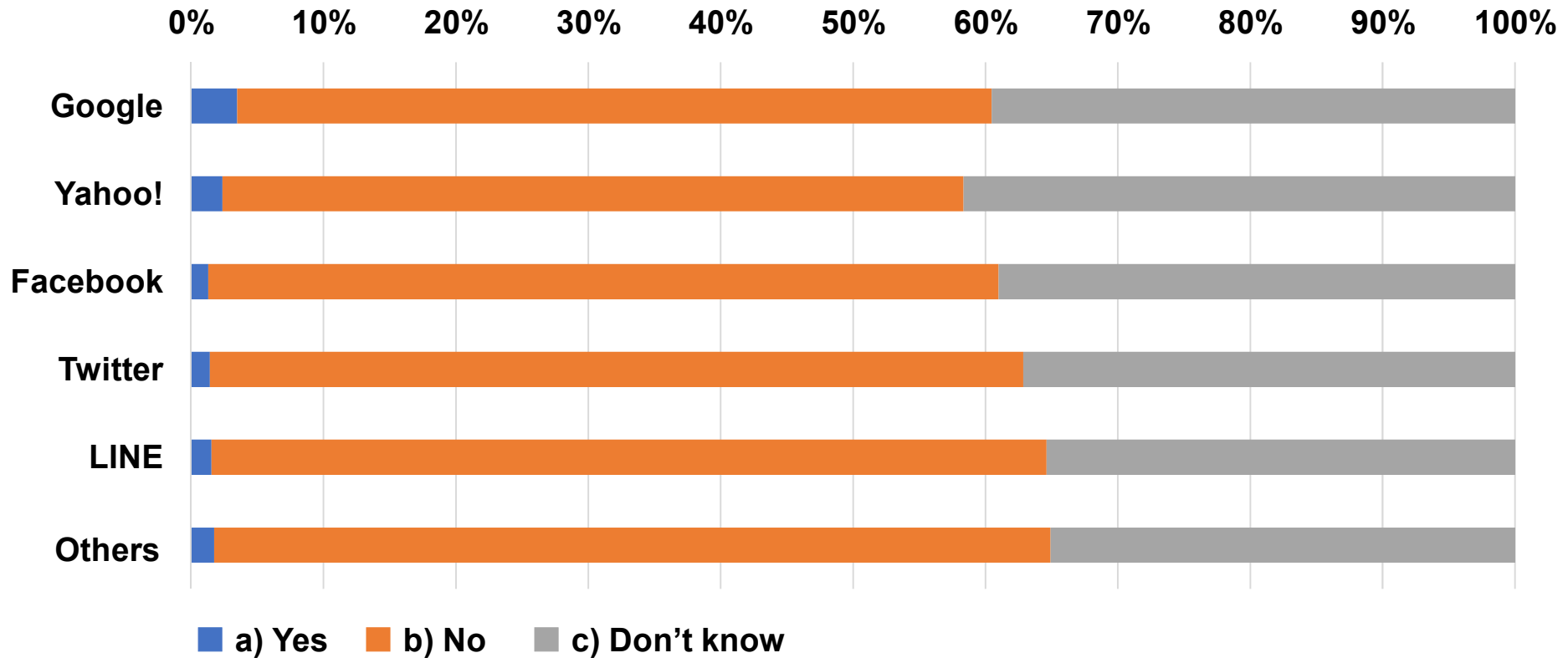
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There was a lack of information disclosure on ad fraud	31	36.0	30	35.7	24	31.2	20	28.6	16	24.6	9	15.8
b) There was insufficient verification of traffic to uncover ad fraud	18	20.9	18	21.4	12	15.6	12	17.1	10	15.4	5	8.8
c) There was lack of preventive measures for ad fraud	19	22.1	18	21.4	10	13.0	9	12.9	9	13.8	2	3.5
d) Swift refunds were not made when ad fraud is discovered	6	7.0	5	6.0	3	3.9	3	4.3	4	6.2	2	3.5
e) Digital platform operators should refund fees related to invalid traffic	21	24.4	21	25.0	17	22.1	16	22.9	13	20.0	9	15.8
f) Other (Select this option if you feel there were issues in ad fraud excluding the above a) to e))	1	1.2	-	-	-	-	-	-	-	-	-	-
g) We do not have complaints	35	40.7	36	42.9	39	50.6	37	52.9	36	55.4	41	71.9
Number of respondents	86	-	84	-	77	-	70	-	65	-	57	-

**Q19-2. (For those who answered a) to f) at Q19) Did your company suffer disadvantages due to this?
[Select one]**



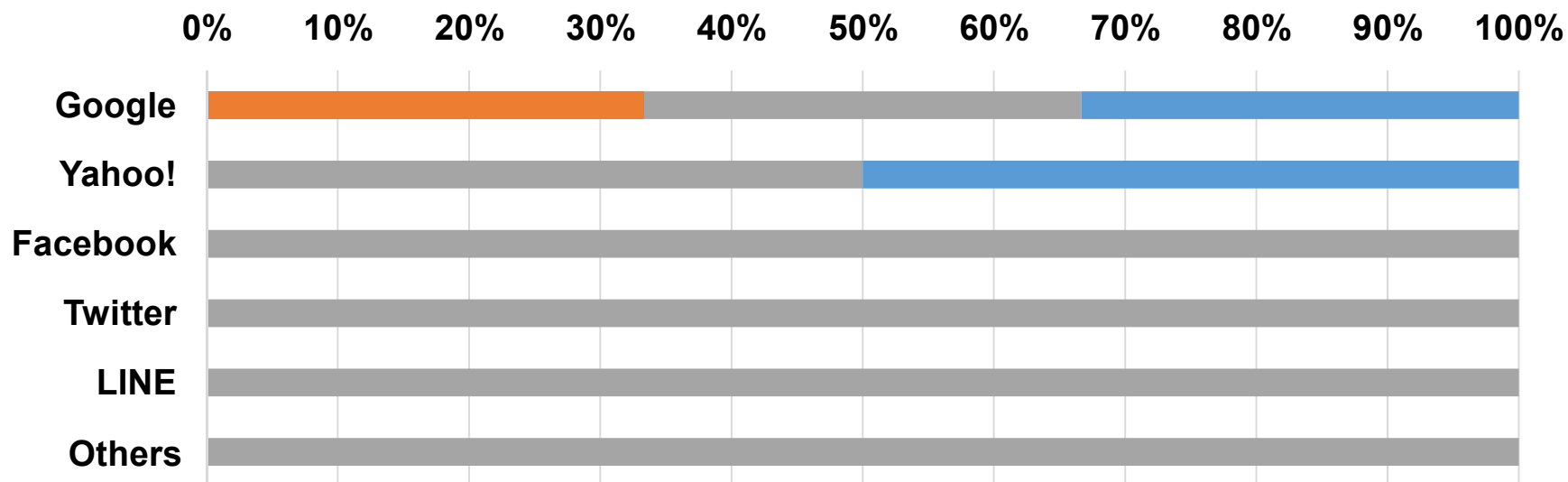
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	6	11.8	6	12.5	5	13.2	4	12.1	4	13.8	1	6.3
b) There were moderate disadvantages	17	33.3	15	31.3	11	28.9	11	33.3	10	34.5	6	37.5
c) There were almost no disadvantages	8	15.7	7	14.6	6	15.8	5	15.2	3	10.3	2	12.5
d) There were no disadvantages	1	2.0	-	-	-	-	-	-	-	-	-	-
e) Don't know	19	37.3	20	41.7	16	42.1	13	39.4	12	41.4	7	43.8
Number of respondents	51	100.0	48	100.0	38	100.0	33	100.0	29	100.0	16	100.0

Q20. When using ad tech services provided by digital platform operators, were there any limitations imposed by the said digital platform operators, in access to necessary data (e.g., data to be used for advertisement efficiency verification) for advertisement distribution (or agency businesses for ad agencies) ? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	3	3.5	2	2.4	1	1.3	1	1.4	1	1.5	1	1.8
b) No	49	57.0	47	56.0	46	59.7	43	61.4	41	63.1	36	63.2
c) Don't know	34	39.5	35	41.7	30	39.0	26	37.1	23	35.4	20	35.1
Number of respondents	86	100.0	84	100.0	77	100.0	70	100.0	65	100.0	57	100.0

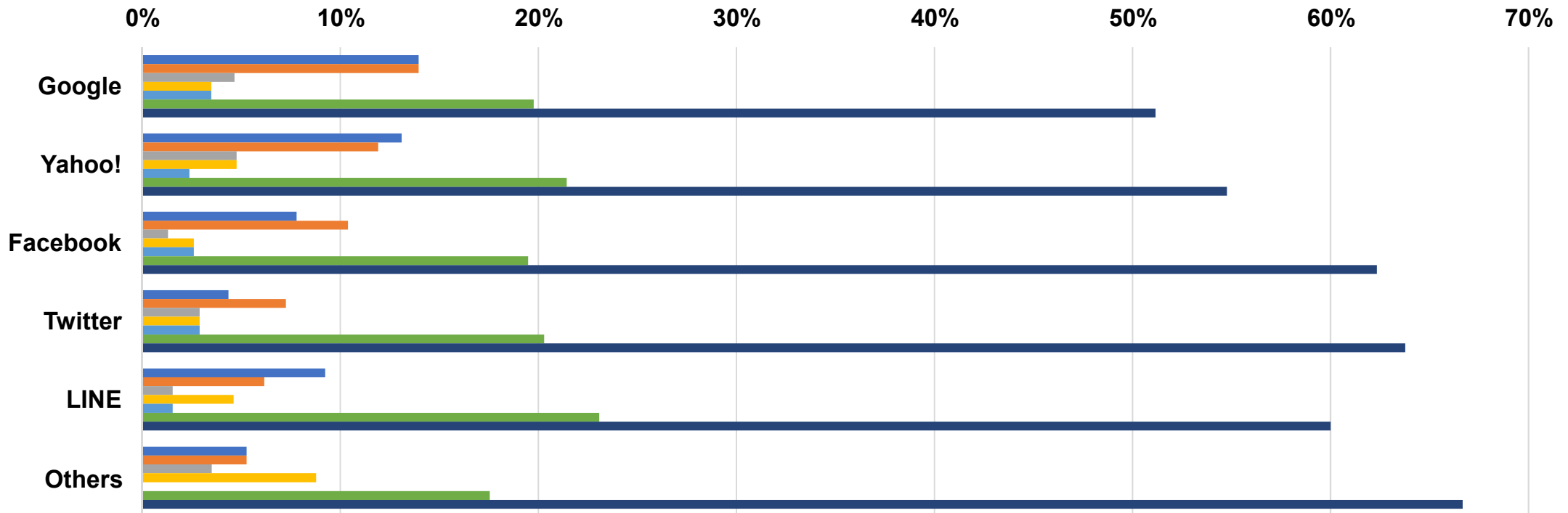
Q20-2. (For those who answered “a) Yes” at Q20) How did this impact your business activities? [Select one]



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	1	33.3	-	-	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	1	33.3	1	50.0	1	100.0	1	100.0	1	100.0	1	100.0
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	1	33.3	1	50.0	-	-	-	-	-	-	-	-
Number of respondents	3	100.0	2	100.0	1	100.0	1	100.0	1	100.0	1	100.0

**Q21. Have you ever felt dissatisfied with review standards when opening an account to use ad tech services provided by digital platform operators? (This includes accounts reviewed midway as well)
[Multiple answers accepted]**

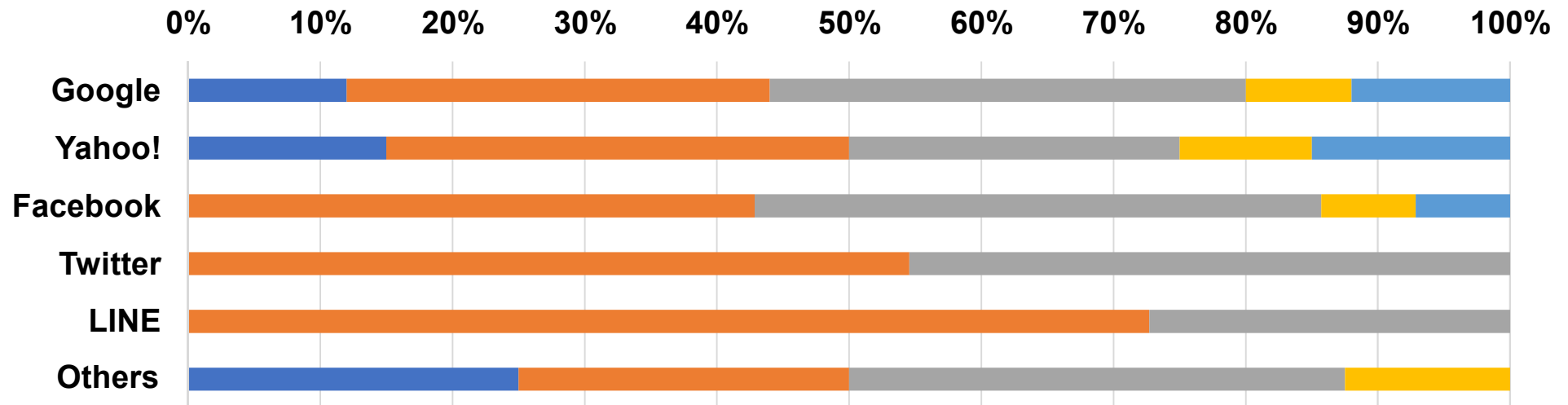


- a) Although review standards are disclosed, the standards are abstract and lack objectivity
- b) Review standards are not fully disclosed and lack transparency
- c) We feel the actual reviews are not done according to the disclosed standards
- d) The reviews are prejudiced and lack consistency
- e) Other (Select this option if there are issues in account review standards excluding the above a) to d))
- f) Don't know
- g) We do not have complaints

**Q21. Have you ever felt dissatisfied with review standards when opening an account to use ad tech services provided by digital platform operators? (This includes accounts reviewed midway as well)
[Multiple answers accepted]**

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Although review standards are disclosed, the standards are abstract and lack objectivity	12	14.0	11	13.1	6	7.8	3	4.3	6	9.2	3	5.3
b) Review standards are not fully disclosed and lack transparency	12	14.0	10	11.9	8	10.4	5	7.2	4	6.2	3	5.3
c) We feel the actual reviews are not done according to the disclosed standards	4	4.7	4	4.8	1	1.3	2	2.9	1	1.5	2	3.5
d) The reviews are prejudiced and lack consistency	3	3.5	4	4.8	2	2.6	2	2.9	3	4.6	5	8.8
e) Other (Select this option if there are issues in account review standards excluding the above a) to d))	3	3.5	2	2.4	2	2.6	2	2.9	1	1.5	-	-
f) Don't know	17	19.8	18	21.4	15	19.5	14	20.3	15	23.1	10	17.5
g) We do not have complaints	44	51.2	46	54.8	48	62.3	44	63.8	39	60.0	38	66.7
Number of respondents	86	-	84	-	77	-	69	-	65	-	57	-

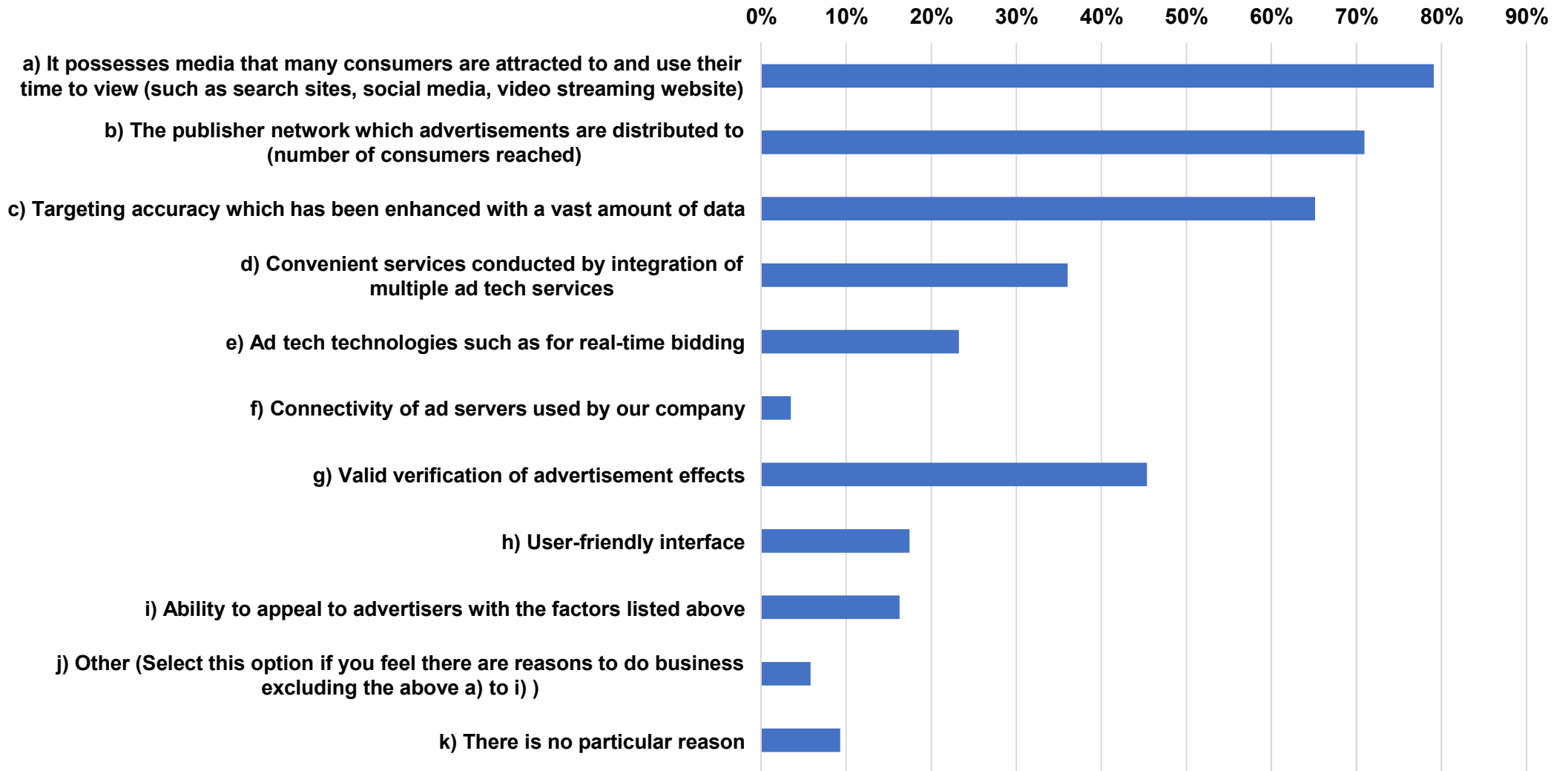
**Q21-2. (For those who answered a) to e) at Q21) How did this impact your business activities?
[Select one]**



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	3	12.0	3	15.0	-	-	-	-	-	-	2	25.0
b) It had a moderate impact on business activities	8	32.0	7	35.0	6	42.9	6	54.5	8	72.7	2	25.0
c) It had only a slight impact on business activities	9	36.0	5	25.0	6	42.9	5	45.5	3	27.3	3	37.5
d) There had been no impact on business activities	2	8.0	2	10.0	1	7.1	-	-	-	-	1	12.5
e) Don't know	3	12.0	3	15.0	1	7.1	-	-	-	-	-	-
Number of respondents	25	100.0	20	100.0	14	100.0	11	100.0	11	100.0	8	100.0

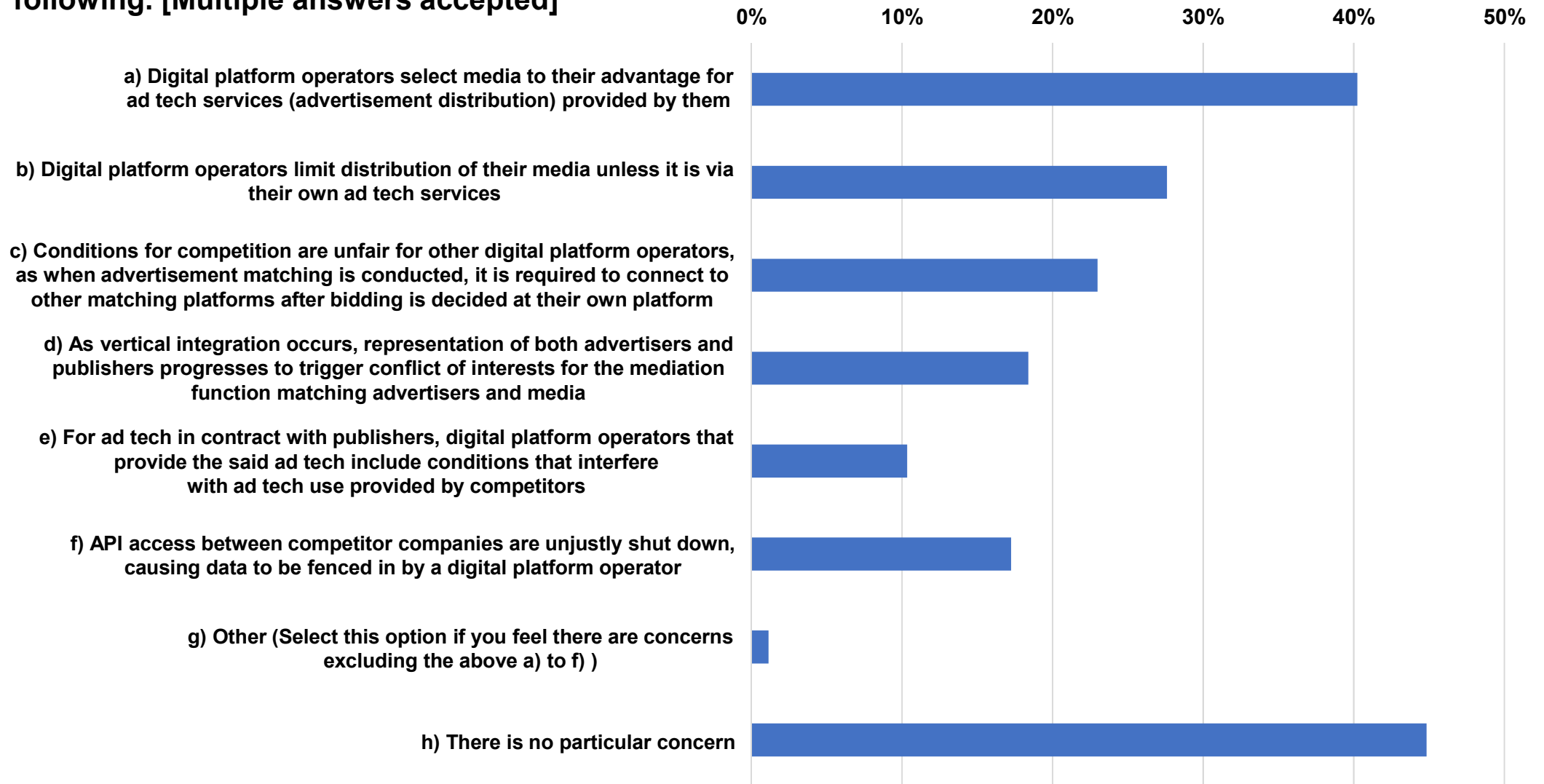
Q22. What are the reasons your company conducts direct business transactions with your current digital platform operator? Please select from the following. [Multiple answers accepted]



Q22. What are the reasons your company conducts direct business transactions with your current digital platform operator? Please select from the following. [Multiple answers accepted]

Answers	Number of answers	Ratio (%)
a) It possesses media that many consumers are attracted to and use their time to view (such as search sites, social media, video streaming website)	68	79.1
b) The publisher network which advertisements are distributed to (number of consumers reached)	61	70.9
c) Targeting accuracy which has been enhanced with a vast amount of data	56	65.1
d) Convenient services conducted by integration of multiple ad tech services	31	36.0
e) Ad tech technologies such as for real-time bidding	20	23.3
f) Connectivity of ad servers used by our company	3	3.5
g) Valid verification of advertisement effects	39	45.3
h) User-friendly interface	15	17.4
i) Ability to appeal to advertisers with the factors listed above	14	16.3
j) Other (Select this option if you feel there are reasons to do business excluding the above a) to i))	5	5.8
k) There is no particular reason	8	9.3
Number of respondents	86	-

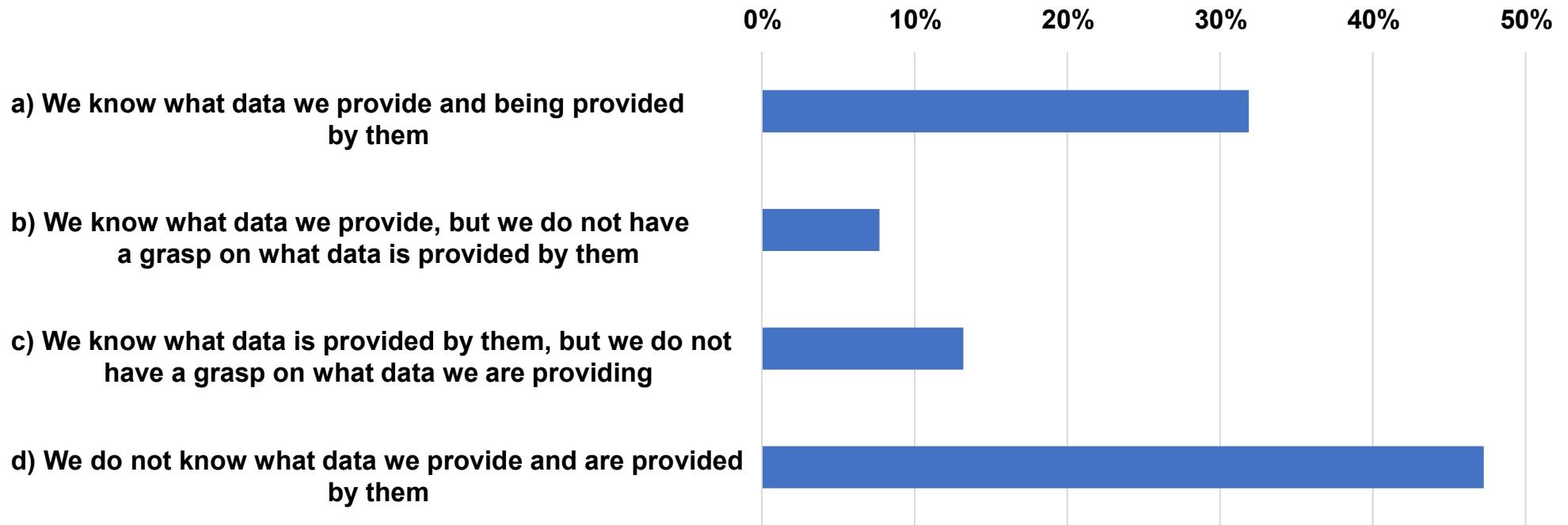
Q23. Currently, in the digital advertising market, there seems to be a certain movement (vertical integration); digital platform operators manage powerful mediums while distributing advertisements (matching) using ad tech in the backdrop of the said media’s power. Do you have any concerns about this progression of vertical integration? If so, what concerns do you have? Please select from the following. [Multiple answers accepted]



Q23. Currently, in the digital advertising market, there seems to be a movement (vertical integration) in which digital platform operators manage powerful mediums while distributing advertisements (matching) using ad tech in the backdrop of the said media's power. Do you have any concerns about this progression of vertical integration? If so, what concerns do you have? Please select from the following. [Multiple answers accepted]

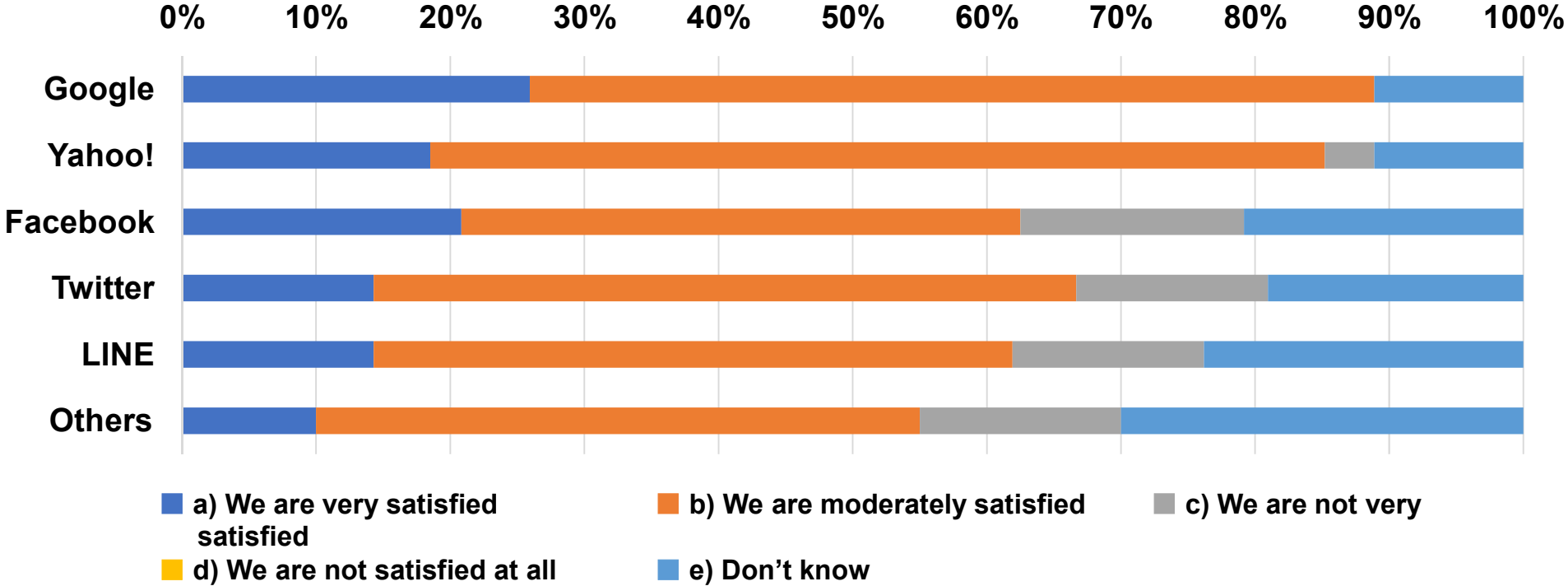
Answers	Number of answers	Ratio (%)
a) Digital platform operators select media to their advantage for ad tech services (advertisement distribution) provided by them	35	40.2
b) Digital platform operators limit distribution of their media unless it is via their own ad tech services	24	27.6
c) Conditions for competition are unfair for other digital platform operators, as when advertisement matching is conducted, it is required to connect to other matching platforms after bidding is decided at their own platform	20	23.0
d) As vertical integration occurs, representation of both advertisers and publishers progresses to trigger conflict of interests for the mediation function matching advertisers and media	16	18.4
e) For ad tech in contract with publishers, digital platform operators that provide the said ad tech include conditions that interfere with ad tech use provided by competitors	9	10.3
f) API access between competitor companies are unjustly shut down, causing data to be fenced in by a digital platform operator	15	17.2
g) Other (Select this option if you feel there are concerns excluding the above a) to f))	1	1.1
h) There is no particular concern	39	44.8
Number of respondents	87	-

Q24. When using ad tech services provided by digital platform operators, do you have a grasp on what type of data you provide to them, or what type of data is provided from them? [Select one]



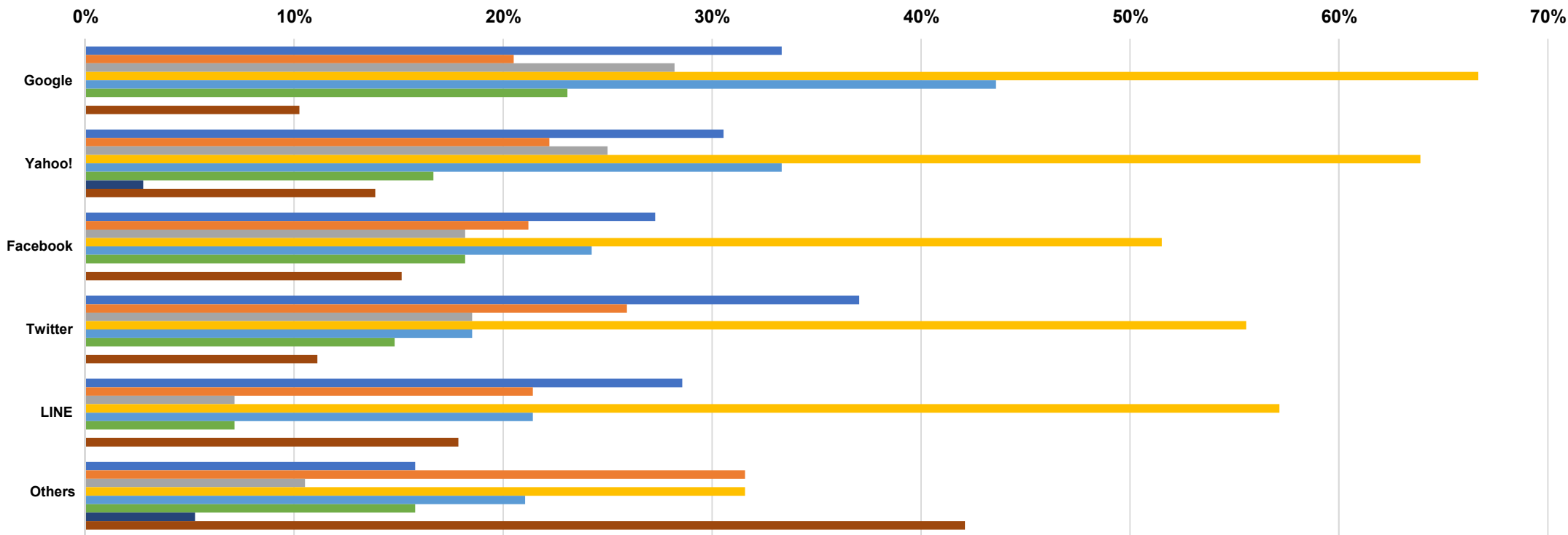
Answers	Number of answers	Ratio (%)
a) We know what data we provide and being provided by them	29	31.9
b) We know what data we provide, but we do not have a grasp on what data is provided by them	7	7.7
c) We know what data is provided by them, but we do not have a grasp on what data we are providing	12	13.2
d) We do not know what data we provide and are provided by them	43	47.3
Number of respondents	91	100.0

Q24-3. (For those who answered “a) We know what data we provide and are being provided by them” at Q24) Are you satisfied with the data provided by the digital platform operation when compared to the data you provide to them? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We are very satisfied	7	25.9	5	18.5	5	20.8	3	14.3	3	14.3	2	10.0
b) We are moderately satisfied	17	63.0	18	66.7	10	41.7	11	52.4	10	47.6	9	45.0
c) We are not very satisfied	-	-	1	3.7	4	16.7	3	14.3	3	14.3	3	15.0
d) We are not satisfied at all	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	3	11.1	3	11.1	5	20.8	4	19.0	5	23.8	6	30.0
Number of respondents	27	100.0	27	100.0	24	100.0	21	100.0	21	100.0	20	100.0

Q25. (For those to answered a) or b) for at least one question out of Q9-2, Q11-2, Q12-2, Q13-3, Q14-2, Q15-3, Q16-2, Q17-2, Q18-2, Q19-2, Q20-2, and Q21-2) This question is for companies who answered they have a certain amount of disadvantageous effects due to actions taken by digital platform operators. Do you believe your company has no choice but to use ad tech services offered by digital platform operators? If so, please select the reasons from the following. [Multiple answers accepted]



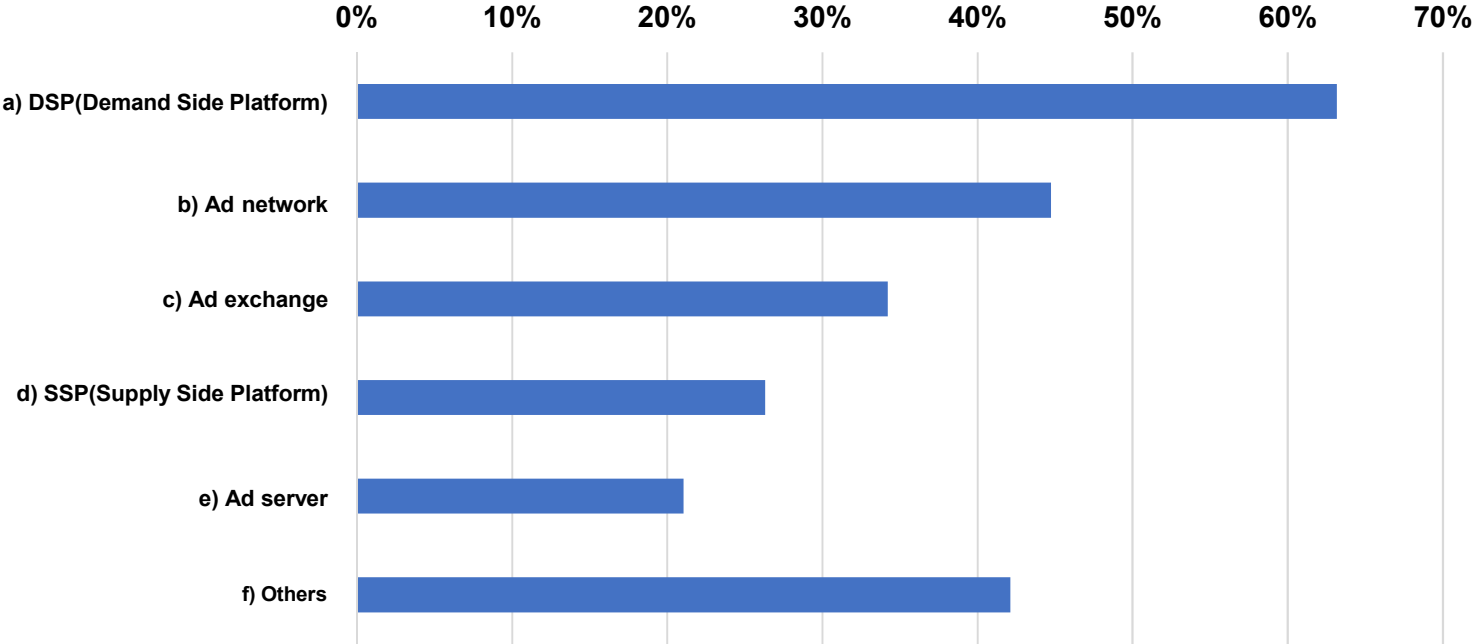
- a) There are no other ad tech service providers except the ad tech service provider in question
- b) The human and financial burden of transitioning to another ad tech service is too large
- c) The accumulated data (such as transaction data) of the said ad tech service is necessary for business
- d) Using the ad tech services in question is effective in order to reach more consumers in the current society, in which digitalization has been progressing
- e) The ad tech service in question is more cost-effective than other ad tech services
- f) Advertisement effectiveness verification is easier with the ad tech service in question
- g) Other (Select this option if you feel there is no other choice to use the current service excluding the above a) to f))
- h) We do not believe our company has no choice but to use ad tech services in question

Q25. (For those to answered a) or b) for at least one question out of Q9-2, Q11-2, Q12-2, Q13-3, Q14-2, Q15-3, Q16-2, Q17-2, Q18-2, Q19-2, Q20-2, and Q21-2) This question is for companies who answered they have a certain amount of disadvantageous effects due to actions taken by digital platform operators. Do you believe your company has no choice but to use ad tech services offered by digital platform operators? If so, please select the reasons from the following. [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There are no other ad tech service providers except the ad tech service provider in question	13	33.3	11	30.6	9	27.3	10	37.0	8	28.6	3	15.8
b) The human and financial burden of transitioning to another ad tech service is too large	8	20.5	8	22.2	7	21.2	7	25.9	6	21.4	6	31.6
c) The accumulated data (such as transaction data) of the said ad tech service is necessary for business	11	28.2	9	25.0	6	18.2	5	18.5	2	7.1	2	10.5
d) Using the ad tech services in question is effective in order to reach more consumers in the current society, in which digitalization has been progressing	26	66.7	23	63.9	17	51.5	15	55.6	16	57.1	6	31.6
e) The ad tech service in question is more cost-effective than other ad tech services	17	43.6	12	33.3	8	24.2	5	18.5	6	21.4	4	21.1
f) Advertisement effectiveness verification is easier with the ad tech service in question	9	23.1	6	16.7	6	18.2	4	14.8	2	7.1	3	15.8
g) Other (Select this option if you feel there is no other choice to use the current service excluding the above a) to f))	-	-	1	2.8	-	-	-	-	-	-	1	5.3
h) We do not believe our company has no choice but to use ad tech services in question	4	10.3	5	13.9	5	15.2	3	11.1	5	17.9	8	42.1
Number of respondents	39	-	36	-	33	-	27	-	28	-	19	-

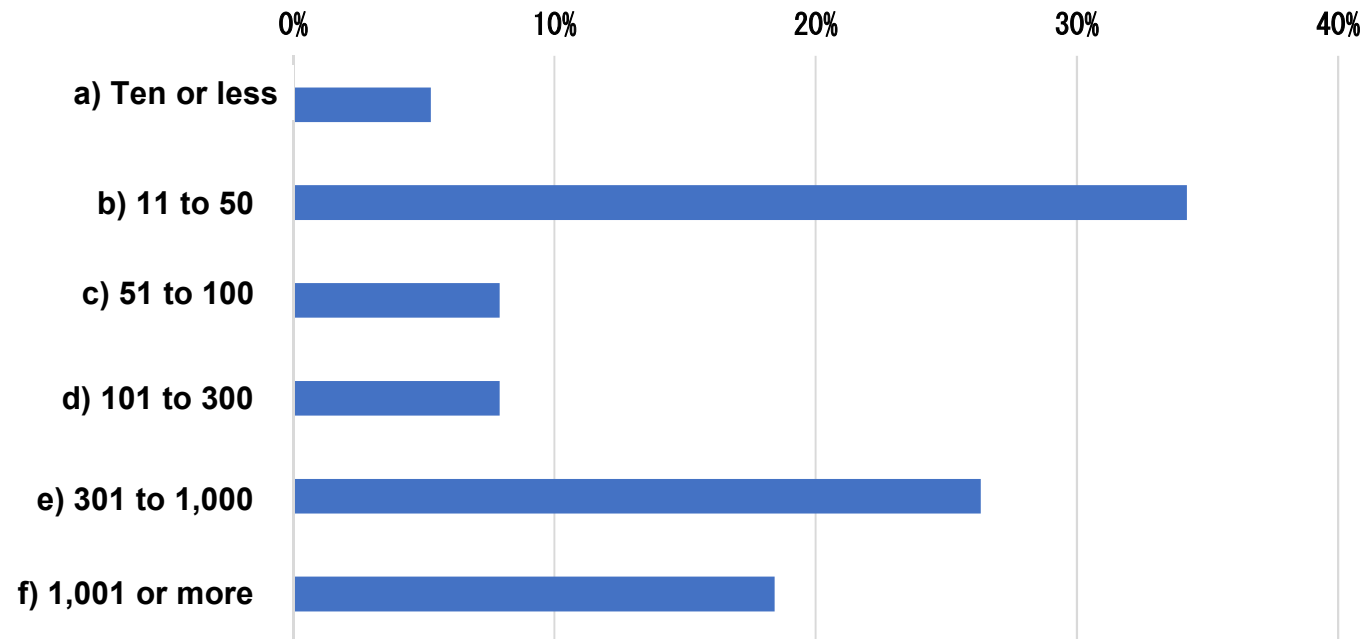
Questionnaire for intermediaries

Q1. Which of the following ad tech services do you operate? [Multiple answers accepted]



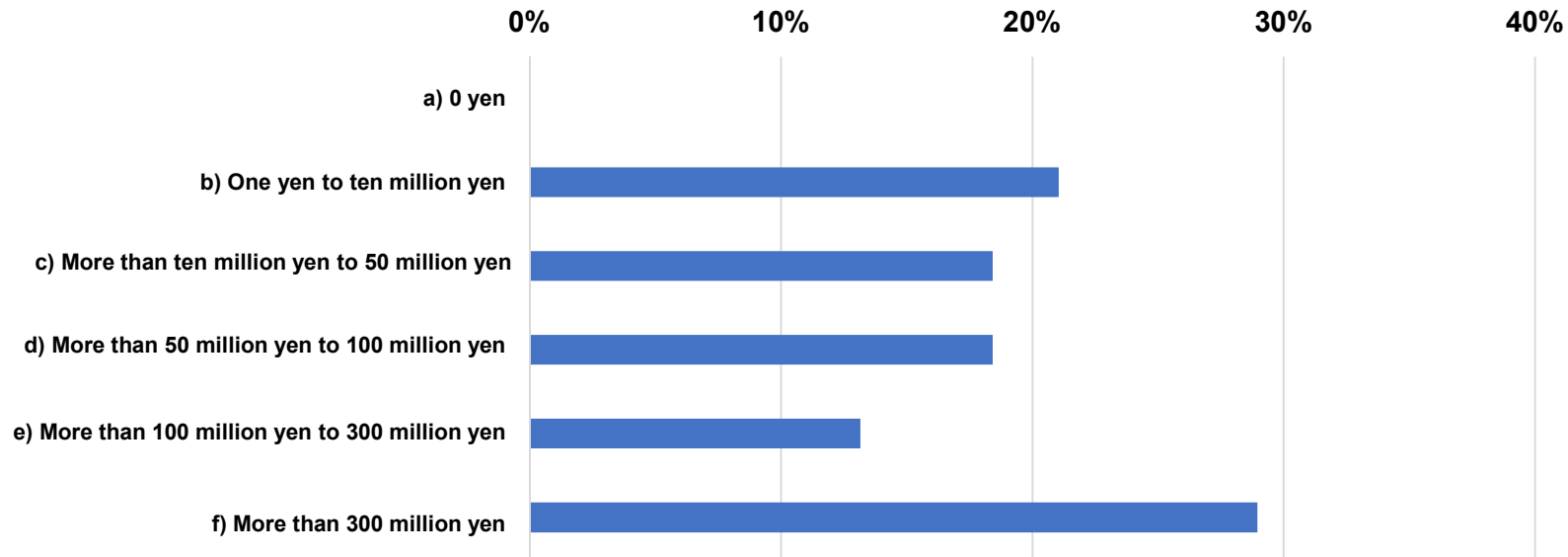
Answers	Number of answers	Ratio(%)
a) DSP (Demand Side Platform)	24	63.2
b) Ad Network	17	44.7
c) Ad Exchange	13	34.2
d) SSP (Supply Side Platform)	10	26.3
e) Ad Server	8	21.1
f) Others	16	42.1
Number of respondents	38	-

Q2. What is the total number of employees in your company? [Select one]



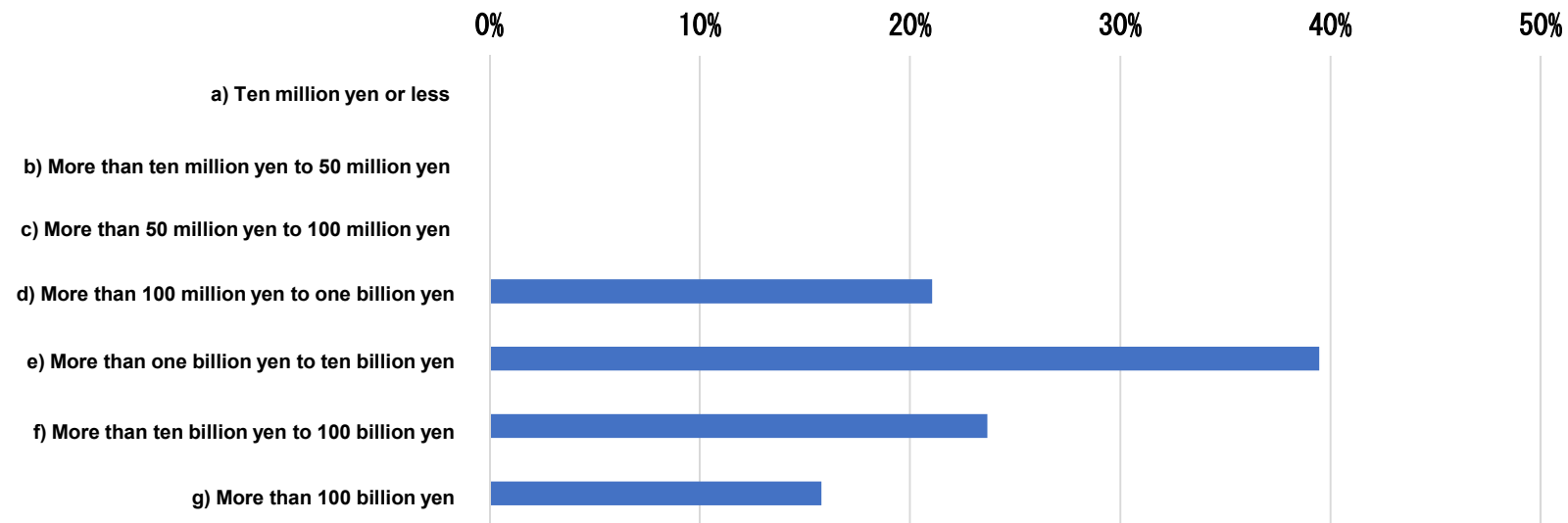
Answers	Number of answers	Ratio (%)
a) Ten or less	2	5.3
b) 11 to 50	13	34.2
c) 51 to 100	3	7.9
d) 101 to 300	3	7.9
e) 301 to 1,000	10	26.3
f) 1,001 or more	7	18.4
Number of respondents	38	100.0

Q3. What is the capital or total amount of investment of your company? [Select one]



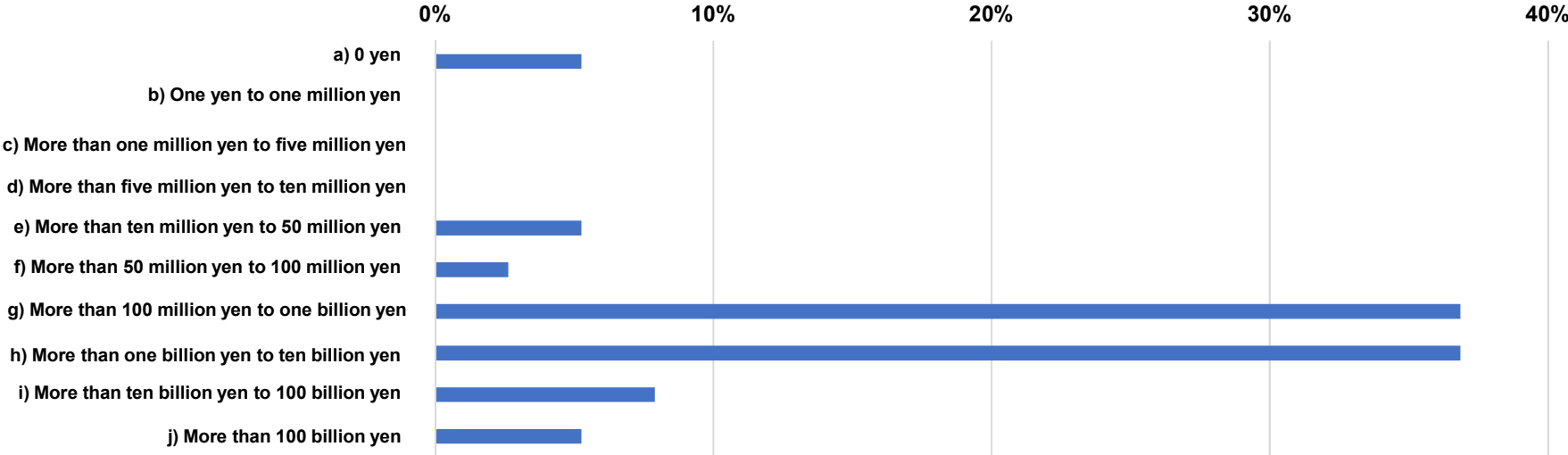
Answers	Number of answers	Ratio (%)
a) 0 yen	0	0
b) One yen to ten million yen	8	21.1
c) More than ten million yen to 50 million yen	7	18.4
d) More than 50 million yen to 100 million yen	7	18.4
e) More than 100 million yen to 300 million yen	5	13.2
f) More than 300 million yen	11	28.9
Number of respondents	38	100.0

Q4. What is the amount of total sales in your company? Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable) [Select one]



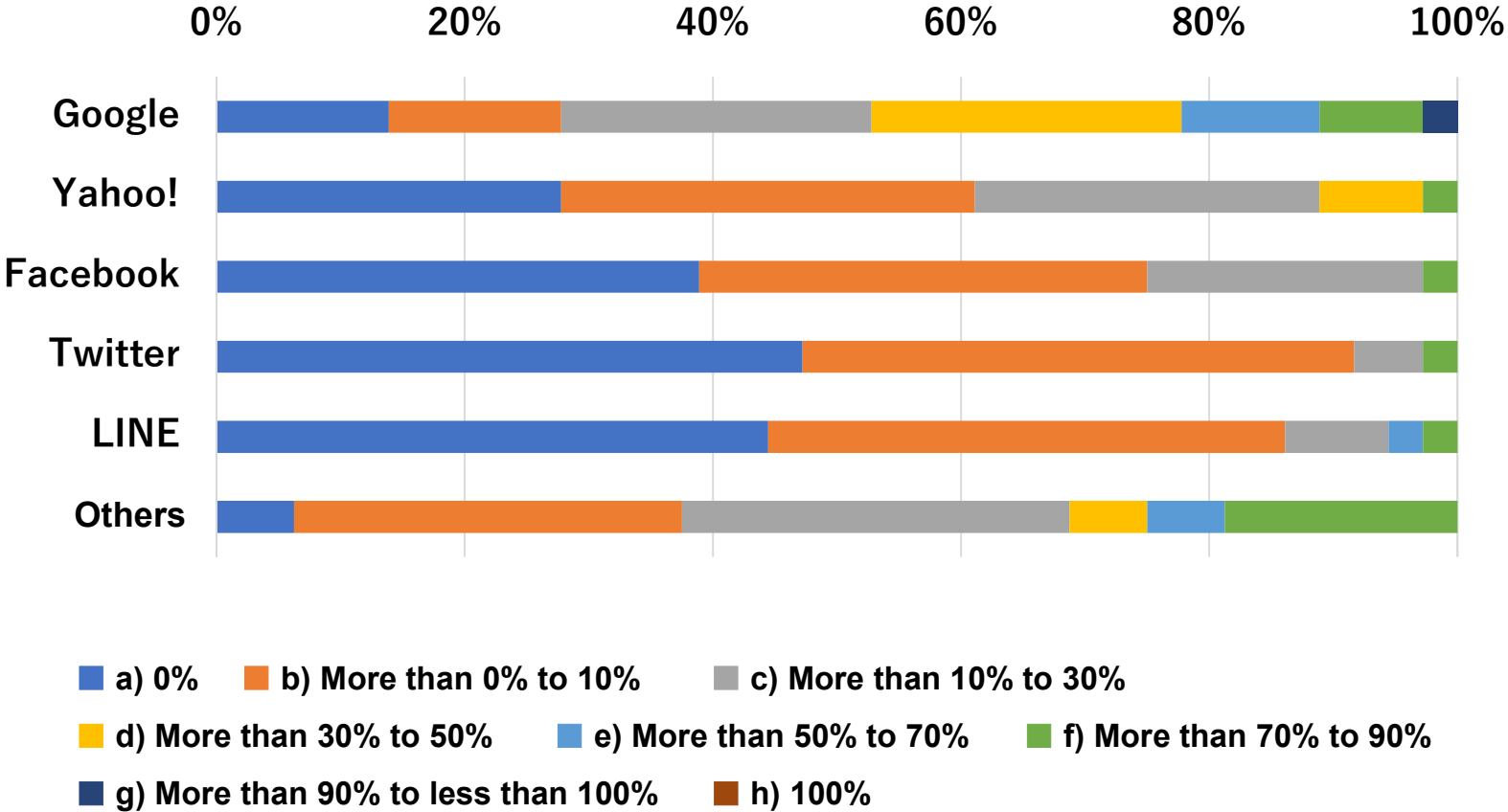
Answers	Number of Answers	Ratio (%)
a) Ten million yen or less	0	0.0
b) More than ten million yen to 50 million yen	0	0.0
c) More than 50 million yen to 100 million yen	0	0.0
d) More than 100 million yen to one billion yen	8	21.1
e) More than one billion yen to ten billion yen	15	39.5
f) More than ten billion yen to 100 billion yen	9	23.7
g) More than 100 billion yen	6	15.8
Number of respondents	38	100.0

Q5. What is the amount of total sales for digital advertising business in your company? Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable)[Select one]



Answers	Number of answers	Ratio (%)
a) 0 yen	2	5.3
b) One yen to one million yen	-	-
c) More than one million yen to five million yen	-	-
d) More than five million yen to ten million yen	-	-
e) More than ten million yen to 50 million yen	2	5.3
f) More than 50 million yen to 100 million yen	1	2.6
g) More than 100 million yen to one billion yen	14	36.8
h) More than one billion yen to ten billion yen	14	36.8
i) More than ten billion yen to 100 billion yen	3	7.9
j) More than 100 billion yen	2	5.3
Number of respondents	38	100.0

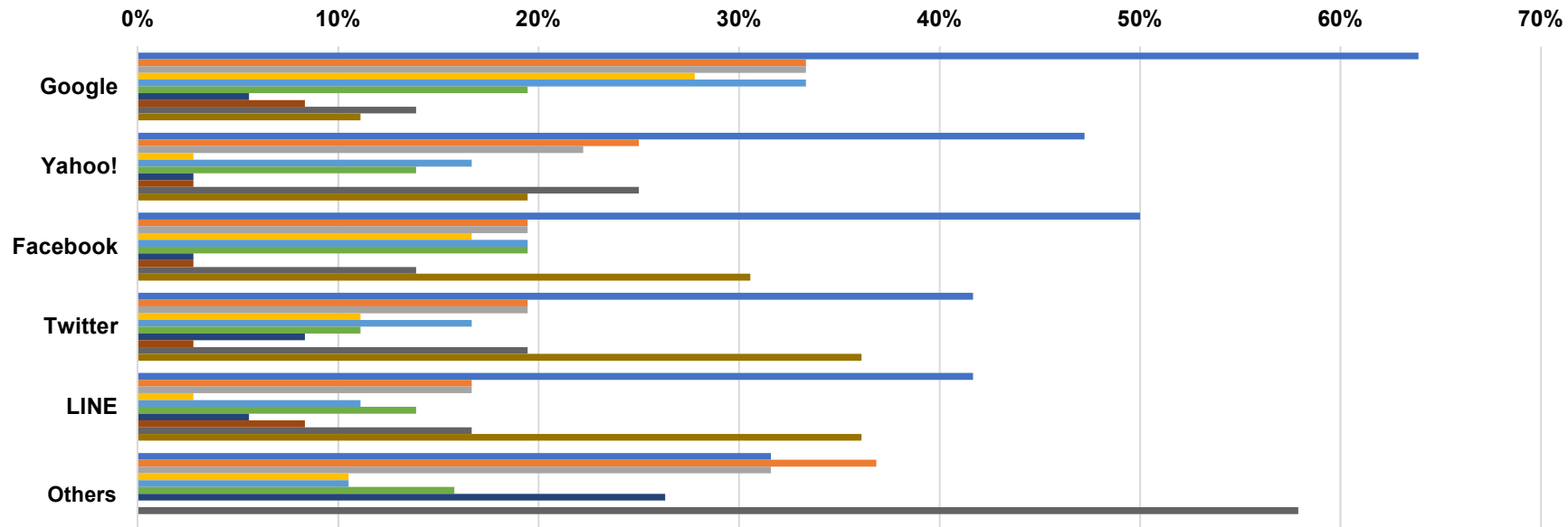
Q6. What is the ratio of revenue from transactions with business partners in your overall digital advertising business sales? Please answer the average amount of three recent fiscal years per business partner. (a rough estimate is acceptable) [Select one]



Q6. What is the ratio of revenue from transactions with business partners in your overall digital advertising business sales? Please answer the average amount of three recent fiscal years per business partner. (a rough estimate is acceptable) [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) 0%	5	13.9	10	27.8	14	38.9	17	47.2	16	44.4	1	6.3
b) More than 0% to 10%	5	13.9	12	33.3	13	36.1	16	44.4	15	41.7	5	31.3
c) More than 10% to 30%	9	25.0	10	27.8	8	22.2	2	5.6	3	8.3	5	31.3
d) More than 30% to 50%	9	25.0	3	8.3	-	-	-	-	-	-	1	6.3
e) More than 50% to 70%	4	11.1	-	-	-	-	-	-	1	2.8	1	6.3
f) More than 70% to 90%	3	8.3	1	2.8	1	2.8	1	2.8	1	2.8	3	18.8
g) More than 90% to less than 100%	1	2.8	-	-	-	-	-	-	-	-	-	-
h) 100%	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	36	100.0	36	100.0	36	100.0	36	100.0	36	100.0	16	100.0

Q7. When doing business with digital platform operators, do contracts with the said digital platform operator contain stipulations as seen below? [Multiple answers accepted]

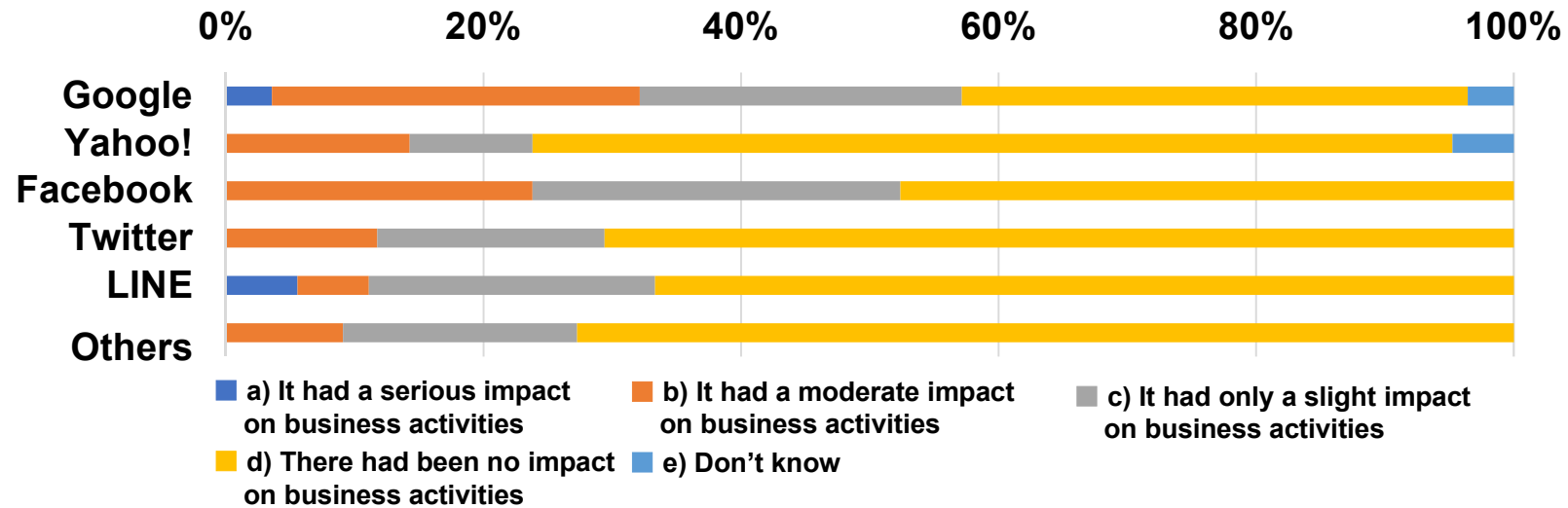


- a) **Contracts are uniform and cannot be changed based on negotiation**
- b) **The said digital platform operators can change contract terms on a discretionary basis**
- c) **Digital platform operators can stop providing their service on a discretionary basis**
- d) **Even if the contract is between two domestic businesses, jurisdiction (such as exclusive court jurisdiction) is established overseas**
- e) **There is no liability or limited liability for any interruption of services (including system failures) of ad tech services offered by the said digital platform operators**
- f) **Compensation for damage can only be claimed from the said digital platform operators (on a one-way basis)**
- g) **Only the said digital platform operator can audit your company system (on a one-way basis)**
- h) **Other (Select this option if there are contract items excluding the above a) to g) which you feel are an issue)**
- i) **There are no issues or problematic provisions as seen above**
- j) **We have never dealt with any of the said digital platform operators**

Q7. When doing business with digital platform operators, do contracts with the said digital platform operator contain stipulations as seen below? [Multiple answers accepted]

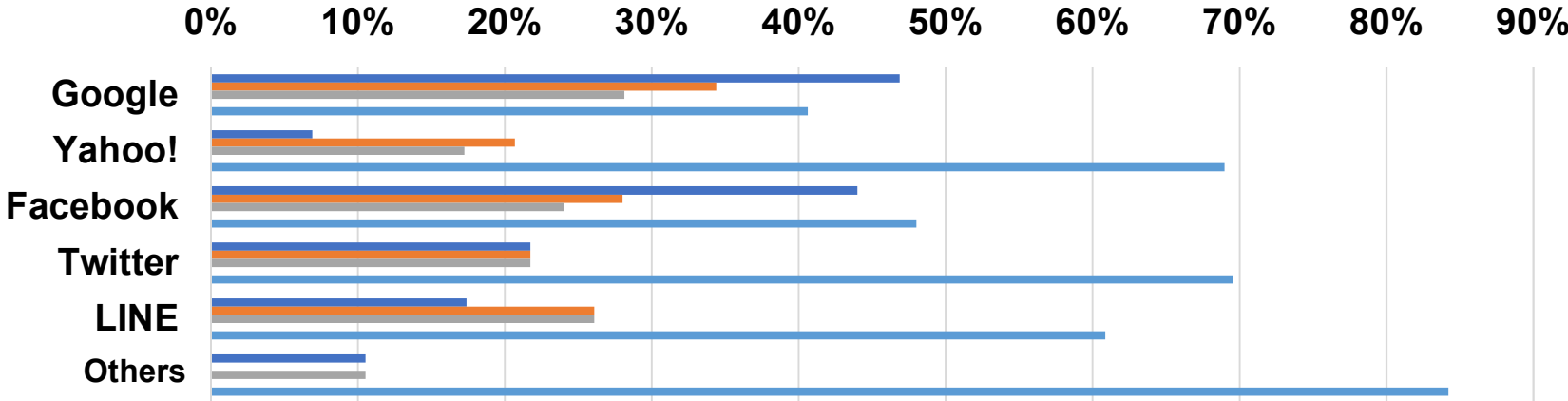
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Contracts are uniform and cannot be changed based on negotiation	23	63.9	17	47.2	18	50.0	15	41.7	15	41.7	6	31.6
b) The said digital platform operators can change contract terms on a discretionary basis	12	33.3	9	25.0	7	19.4	7	19.4	6	16.7	7	36.8
c) Digital platform operators can stop providing their service on a discretionary basis	12	33.3	8	22.2	7	19.4	7	19.4	6	16.7	6	31.6
d) Even if the contract is between two domestic businesses, jurisdiction (such as exclusive court jurisdiction) is established overseas	10	27.8	1	2.8	6	16.7	4	11.1	1	2.8	2	10.5
e) There is no liability or limited liability for any interruption of services (including system failures) of ad tech services offered by the said digital platform operators	12	33.3	6	16.7	7	19.4	6	16.7	4	11.1	2	10.5
f) Compensation for damage can only be claimed from the said digital platform operators (on a one-way basis)	7	19.4	5	13.9	7	19.4	4	11.1	5	13.9	3	15.8
g) Only the said digital platform operator can audit your company system (on a one-way basis)	2	5.6	1	2.8	1	2.8	3	8.3	2	5.6	5	26.3
h) Other (Select this option if there are contract items excluding the above a) to g) which you feel are an issue)	3	8.3	1	2.8	1	2.8	1	2.8	3	8.3	-	-
i) There are no issues or problematic provisions as seen above	5	13.9	9	25.0	5	13.9	7	19.4	6	16.7	11	57.9
j) We have never dealt with any of the said digital platform operators	4	11.1	7	19.4	11	30.6	13	36.1	13	36.1	-	-
Number of respondents	36	-	36	-	36	-	36	-	36	-	19	-

Q7-2. (For those who answered a) to h) at Q7) How does the contract impact your business activities? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	1	3.6	-	-	-	-	-	-	1	5.6	-	-
b) It had a moderate impact on business activities	8	28.6	3	14.3	5	23.8	2	11.8	1	5.6	1	9.1
c) It had only a slight impact on business activities	7	25.0	2	9.5	6	28.6	3	17.6	4	22.2	2	18.2
d) There had been no impact on business activities	11	39.3	15	71.4	10	47.6	12	70.6	12	66.7	8	72.7
e) Don't know	1	3.6	1	4.8	-	-	-	-	-	-	-	-
Number of respondents	28	100.0	21	100.0	21	100.0	17	100.0	18	100.0	11	100.0

Q8. When using the ad tech services provided by digital platform operators, did you experience any of the following changes with transition to the said ad tech service system? [Multiple answers accepted]

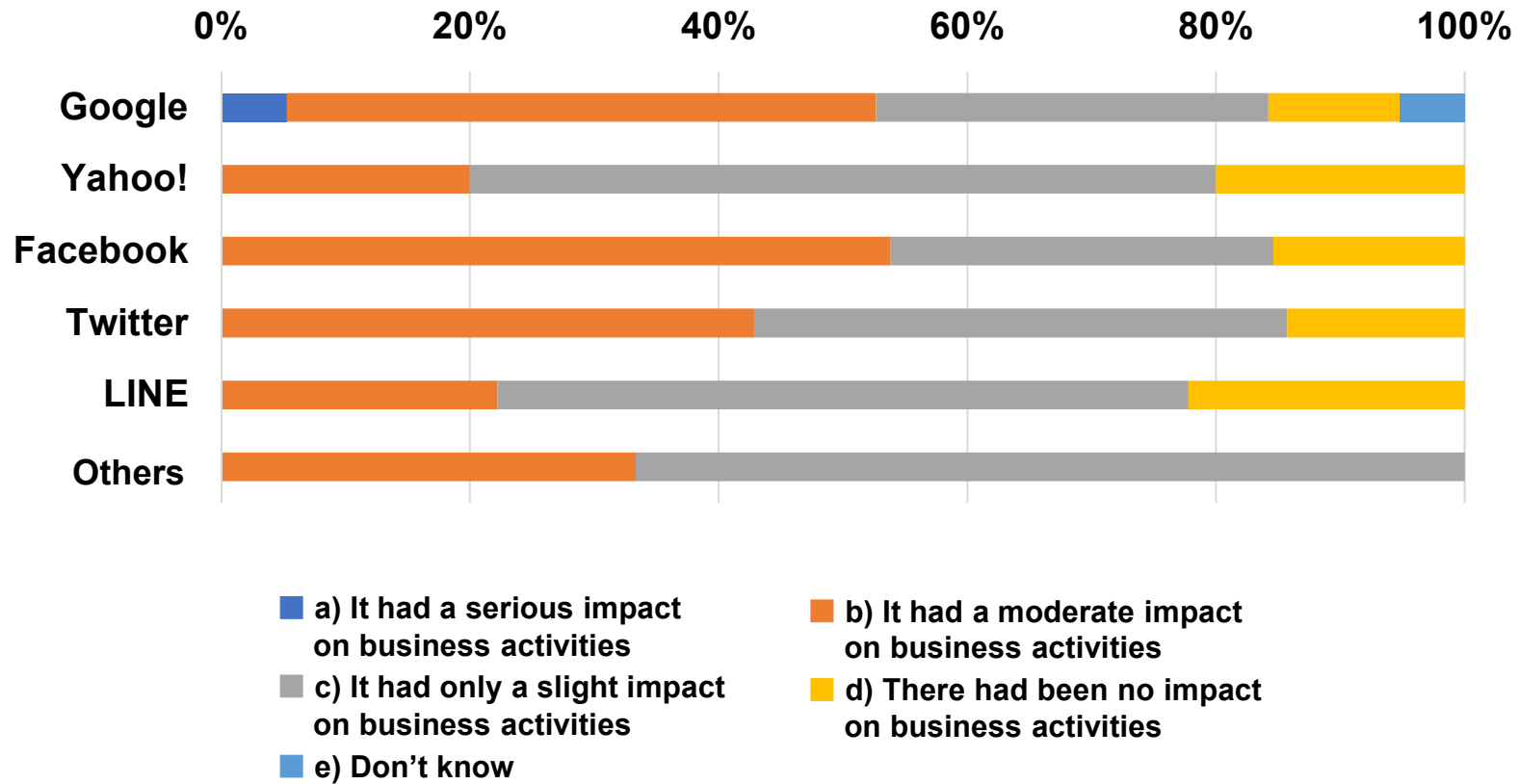


- a) We struggled to correspond to the sudden system change
- b) Reasons for the system change were not clearly stated
- c) Company wishes were not reflected in the system change
- d) Other (Select this option if there are issues in system change excluding the above a) to c))
- e) There are no issues, and no problems as seen above

Q8. When using the ad tech services provided by digital platform operators, did you experience any of the following changes with transition to the said ad tech service system? [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We struggled to correspond to the sudden system change	15	46.9	2	6.9	11	44.0	5	21.7	4	17.4	2	10.5
b) Reasons for the system change were not clearly stated	11	34.4	6	20.7	7	28.0	5	21.7	6	26.1	-	-
c) Company wishes were not reflected in the system change	9	28.1	5	17.2	6	24.0	5	21.7	6	26.1	2	10.5
d) Other (Select this option if there are issues in system change excluding the above a) to c))	-	-	-	-	-	-	-	-	-	-	-	-
e) There are no issues, and no problems as seen above	13	40.6	20	69.0	12	48.0	16	69.6	14	60.9	16	84.2
Number of respondents	32	-	29	-	25	-	23	-	23	-	19	-

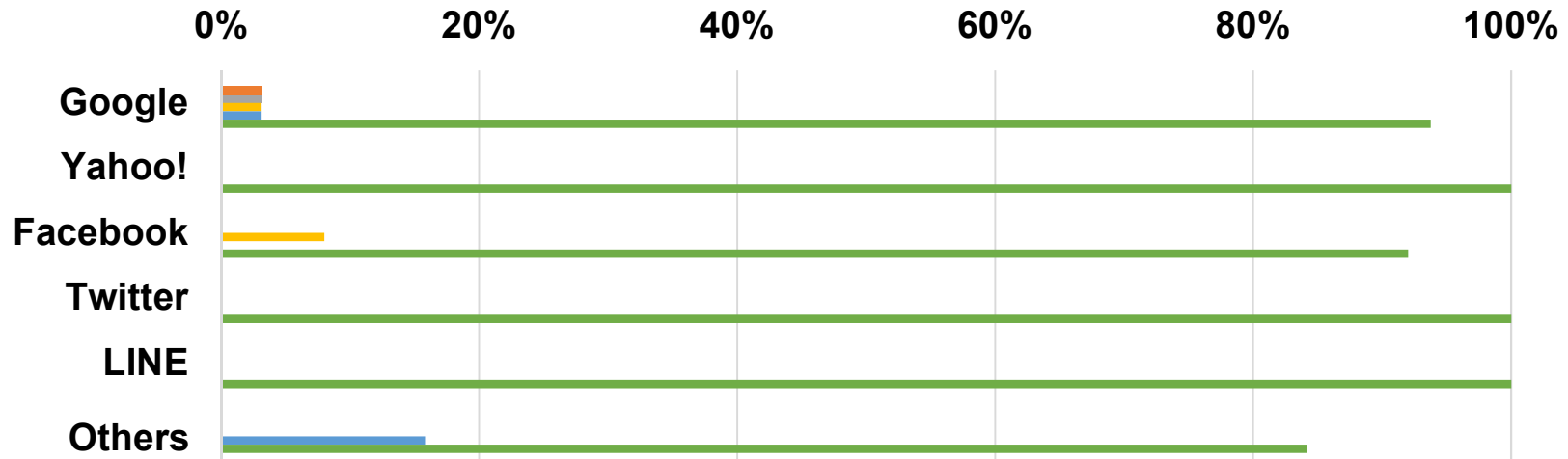
Q8-2. (For those who answered a) to d) at Q8) How did this impact your business activities? [Select one]



Q8-2. (For those who answered a) to d) at Q8) How did this impact your business activities? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	1	5.3	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	9	47.4	2	20.0	7	53.8	3	42.9	2	22.2	2	33.3
c) It had only a slight impact on business activities	6	31.6	6	60.0	4	30.8	3	42.9	5	55.6	4	66.7
d) There had been no impact on business activities	2	10.5	2	20.0	2	15.4	1	14.3	2	22.2	-	-
e) Don't know	1	5.3	-	-	-	-	-	-	-	-	-	-
Number of respondents	19	100.0	10	100.0	13	100.0	7	100.0	9	100.0	6	100.0

Q9. When using the ad tech services provided by digital platform operators, did you experience any of the following? [Multiple answers accepted]

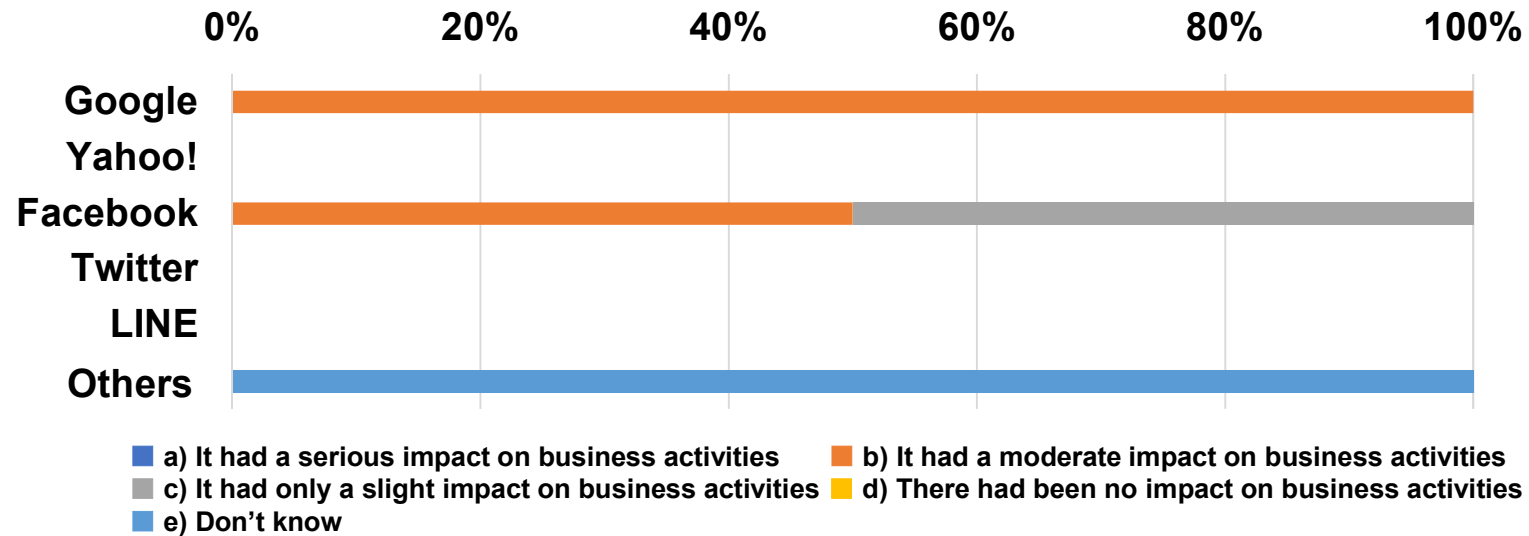


- a) Digital platform operators prohibited use of other third-party services
- b) Staff from the digital platform operators told us not to use third-party services (Explicitly or implicitly)
- c) Consultation to digital platform operators was necessary when using a third-party service that is not an ad tech service provided by them.
- d) There was no clear explanation on why an account was suspended
- e) Other (Select this option if there were issues in using third-party services excluding the above a) to d))
- f) There were no issues, and no problems as seen above

Q9. When using the ad tech services provided by digital platform operators, did you experience any of the following? [Multiple answers accepted]

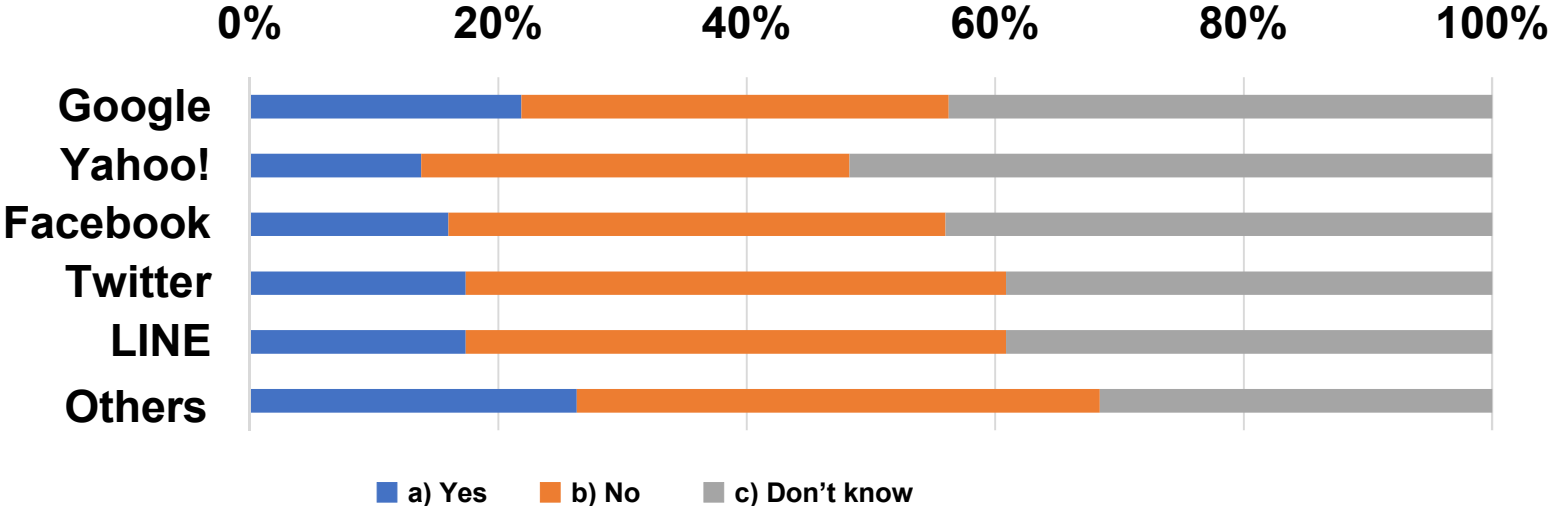
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Digital platform operators prohibited use of other third-party services	-	-	-	-	-	-	-	-	-	-	-	-
b) Staff from the digital platform operators told us not to use third-party services (Explicitly or implicitly)	1	3.1	-	-	-	-	-	-	-	-	-	-
c) Consultation to digital platform operators was necessary when using a third-party service that is not an ad tech service provided by them.	1	3.1	-	-	-	-	-	-	-	-	-	-
d) There was no clear explanation on why an account was suspended	1	3.1	-	-	2	8.0	-	-	-	-	-	-
e) Other (Select this option if there were issues in using third-party services excluding the above a) to d))	1	3.1	-	-	-	-	-	-	-	-	3	15.8
f) There were no issues, and no problems as seen above	30	93.8	29	100.0	23	92.0	23	100.0	23	100.0	16	84.2
Number of respondents	32	-	29	-	25	-	23	-	23	-	19	-

Q9-2. (For those who answered a) to e) at Q9) How did this impact your business activities? [Select one]



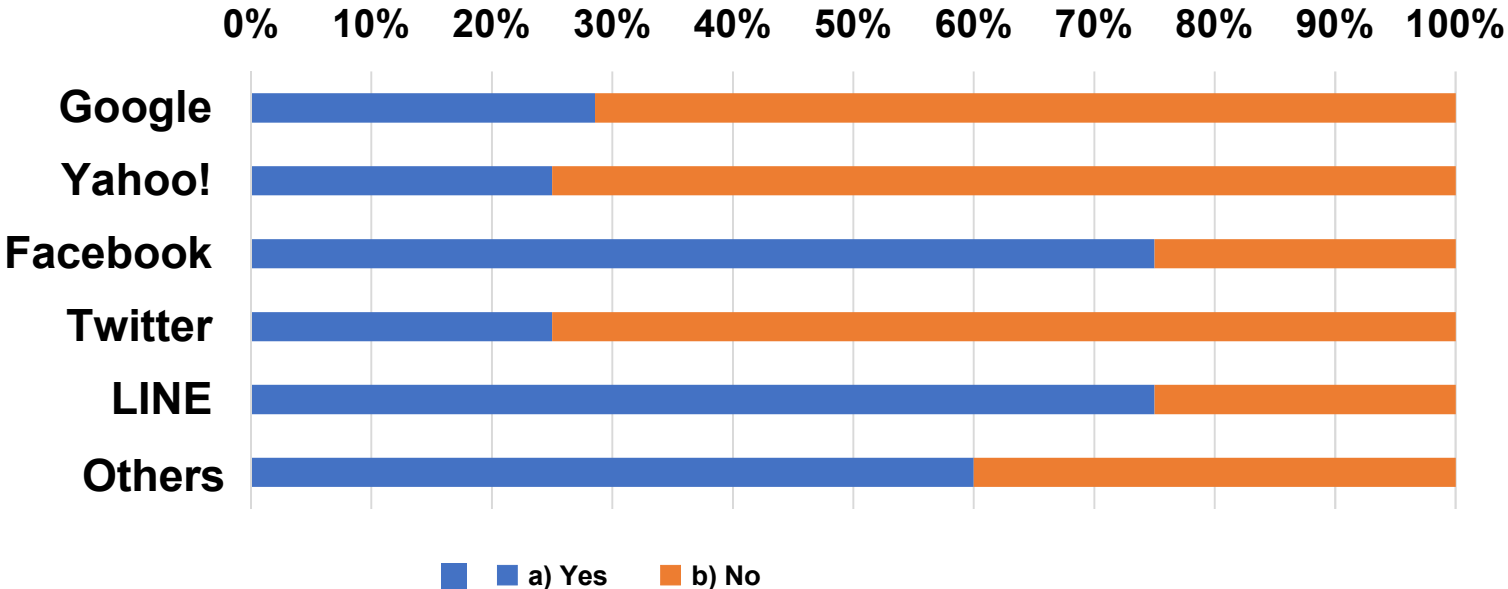
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	2	100.0	-	-	1	50.0	-	-	-	-	-	-
c) It had only a slight impact on business activities	-	-	-	-	1	50.0	-	-	-	-	-	-
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	-	-	-	-	-	-	-	-	-	-	3	100.0
Number of respondents	2	100.0	-	-	2	100.0	-	-	-	-	3	100.0

Q10. When using the ad tech services provided by digital platform operators to distribute advertisements through your own ad tech services (DSP etc.), was there a case in which your company was not able to distribute advertisements in the wanted inventory, despite bidding at a price your company believed was more than reasonable? [Select one]



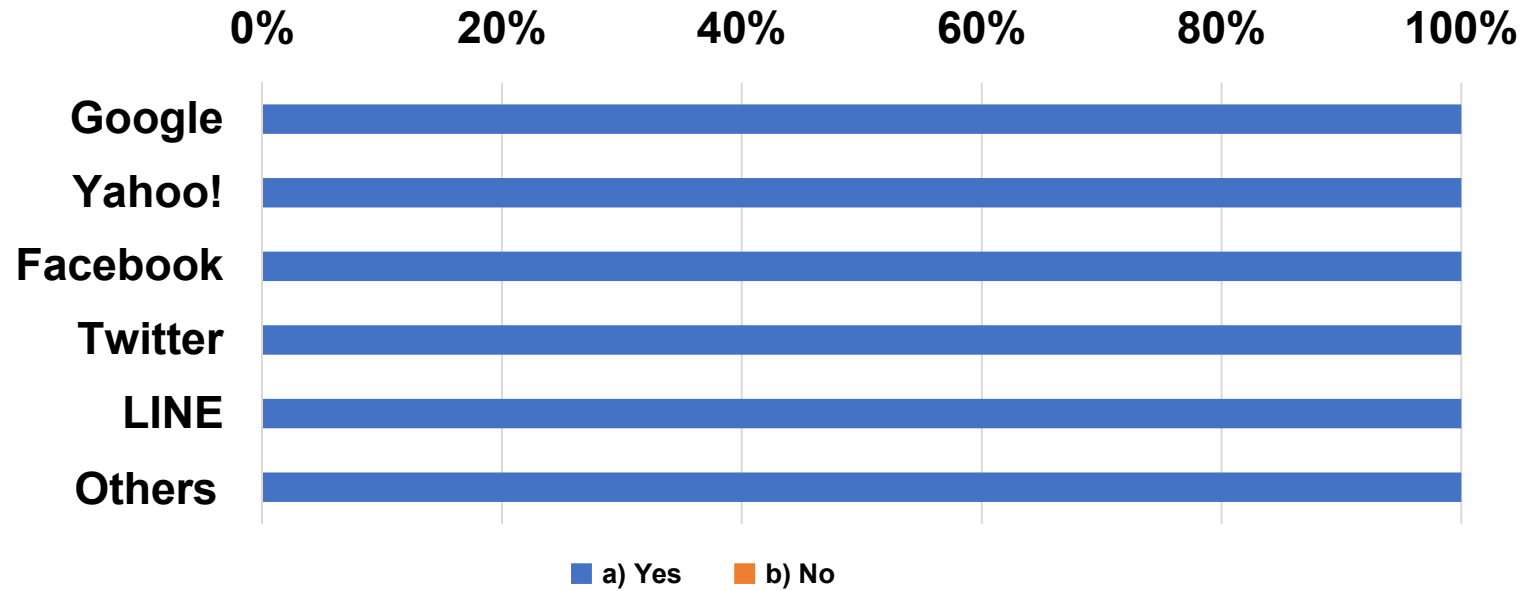
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	7	21.9	4	13.8	4	16.0	4	17.4	4	17.4	5	26.3
b) No	11	34.4	10	34.5	10	40.0	10	43.5	10	43.5	8	42.1
c) Don't know	14	43.8	15	51.7	11	44.0	9	39.1	9	39.1	6	31.6
Number of respondents	32	100.0	29	100.0	25	100.0	23	100.0	23	100.0	19	100.0

Q10-1. (For those who answered “a) Yes” at Q10) Was there an explanation from the said digital platform operator on why the advertisement was not distributed? [Select one]



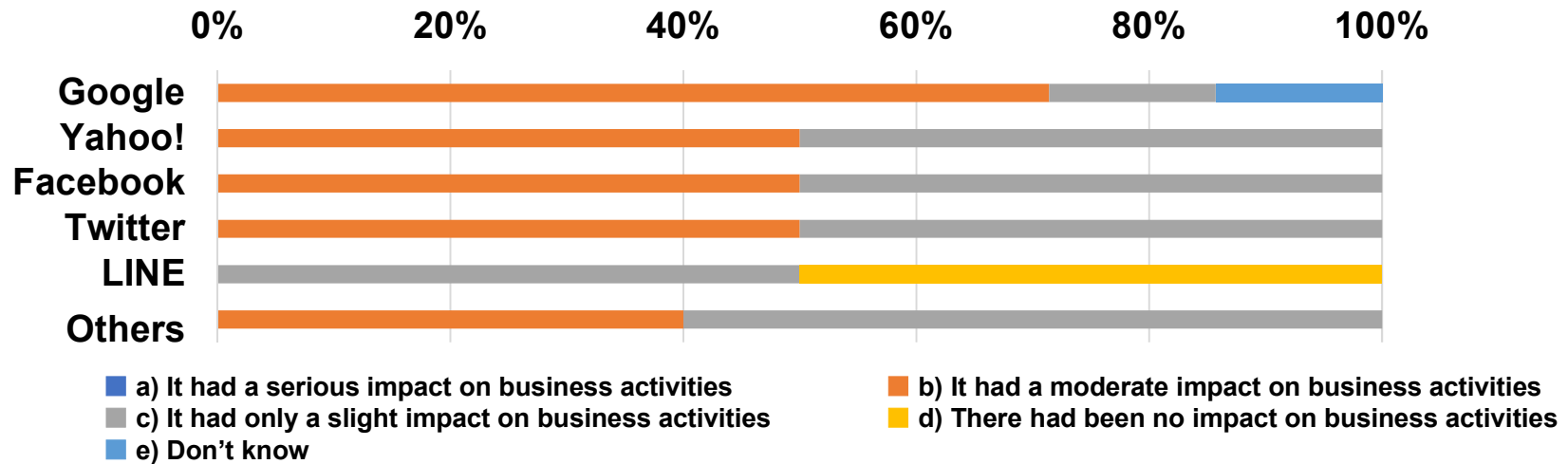
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	2	28.6	1	25.0	3	75.0	1	25.0	3	75.0	3	60.0
b) No	5	71.4	3	75.0	1	25.0	3	75.0	1	25.0	2	40.0
Number of respondents	7	100.0	4	100.0	4	100.0	4	100.0	4	100.0	5	100.0

Q10-1-1. (For those who answered “a) Yes” at Q10-1) Was your company satisfied with the explanation? [Select one]



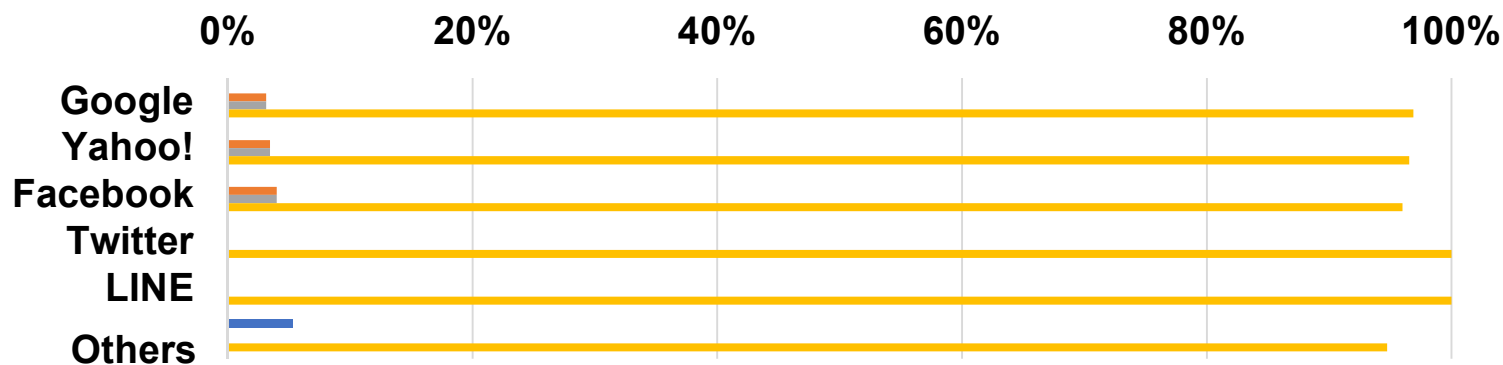
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	2	100.0	1	100.0	3	100.0	1	100.0	3	100.0	3	100.0
b) No	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	2	100.0	1	100.0	3	100.0	1	100.0	3	100.0	3	100.0

Q10-3. (For those who answered “a) Yes” at Q10) How did being unable to distribute advertisements impact your business activities? [Select one] (*If there were multiple cases, answer the one case that had the most impact on your company.)



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	5	71.4	2	50.0	2	50.0	2	50.0	-	-	2	40.0
c) It had only a slight impact on business activities	1	14.3	2	50.0	2	50.0	2	50.0	2	50.0	3	60.0
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	2	50.0	-	-
e) Don't know	1	14.3	-	-	-	-	-	-	-	-	-	-
Number of respondents	7	100.0	4	100.0	4	100.0	4	100.0	4	100.0	5	100.0

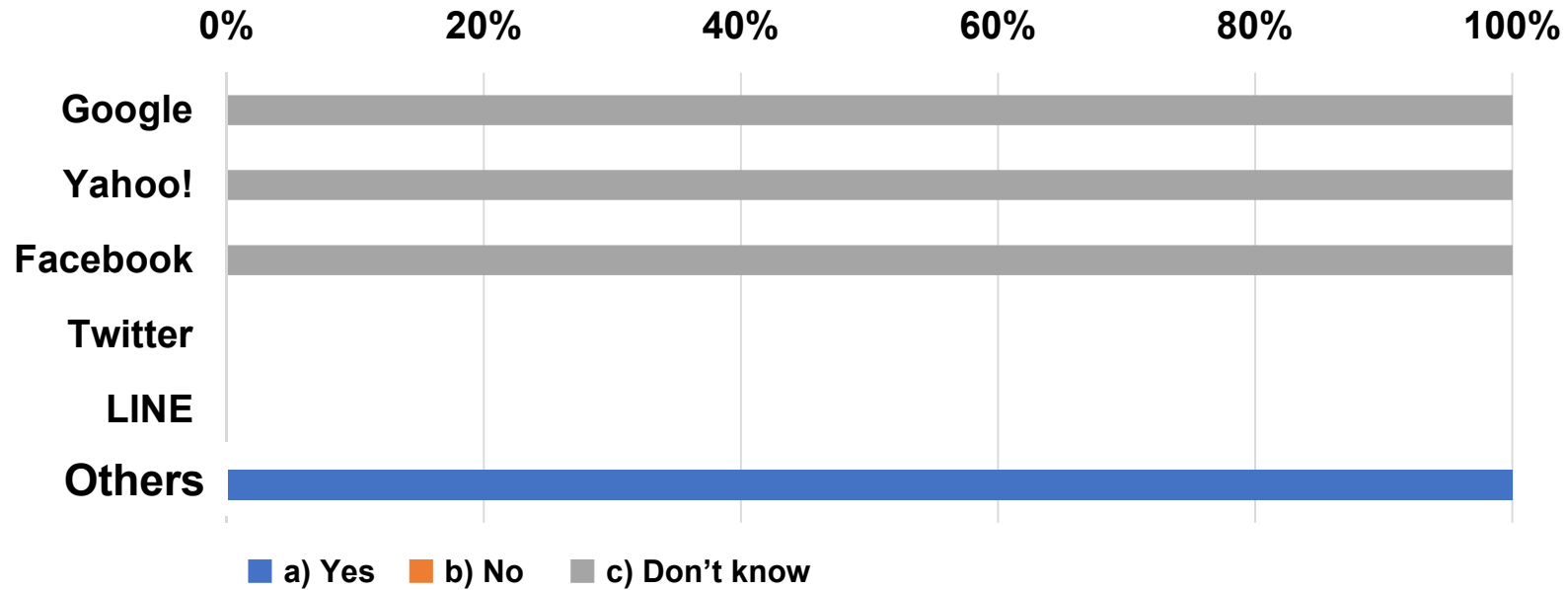
Q11. As a condition of using the ad tech services provided by digital platform operators, did the said digital platform operators ask you to suspend or ban the following business activities? [Multiple answers accepted]



- a) Overall business that competes with the business implemented by the said digital platform operators
- b) User information collection business for implementing ad tech services
- c) Data sales business related to user behavior, etc.
- d) You have never been asked to suspend or ban the business activities listed above

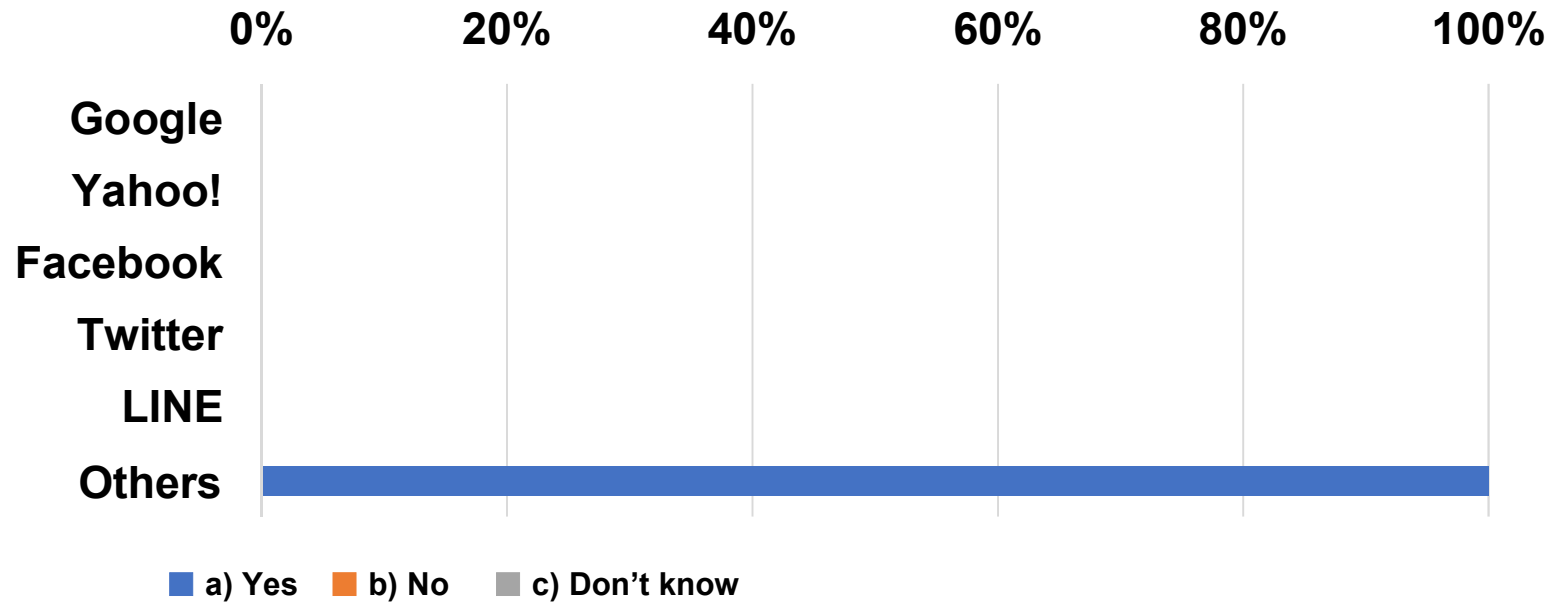
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Overall business that competes with the business implemented by the said digital platform operators	-	-	-	-	-	-	-	-	-	-	1	5.3
b) User information collection business for implementing ad tech services	1	3.1	1	3.4	1	4.0	-	-	-	-	-	-
c) Data sales business related to user behavior, etc.	1	3.1	1	3.4	1	4.0	-	-	-	-	-	-
d) You have never been asked to suspend or ban the business activities listed above	31	96.9	28	96.6	24	96.0	23	100.0	23	100.0	18	94.7
Number of respondents	32	-	29	-	25	-	23	-	23	-	19	-

Q11-1. (For those who answered a) to c) at Q11) Was there an explanation from the said digital platform operator on why it asked you to suspend or ban your business activities? [Select one]



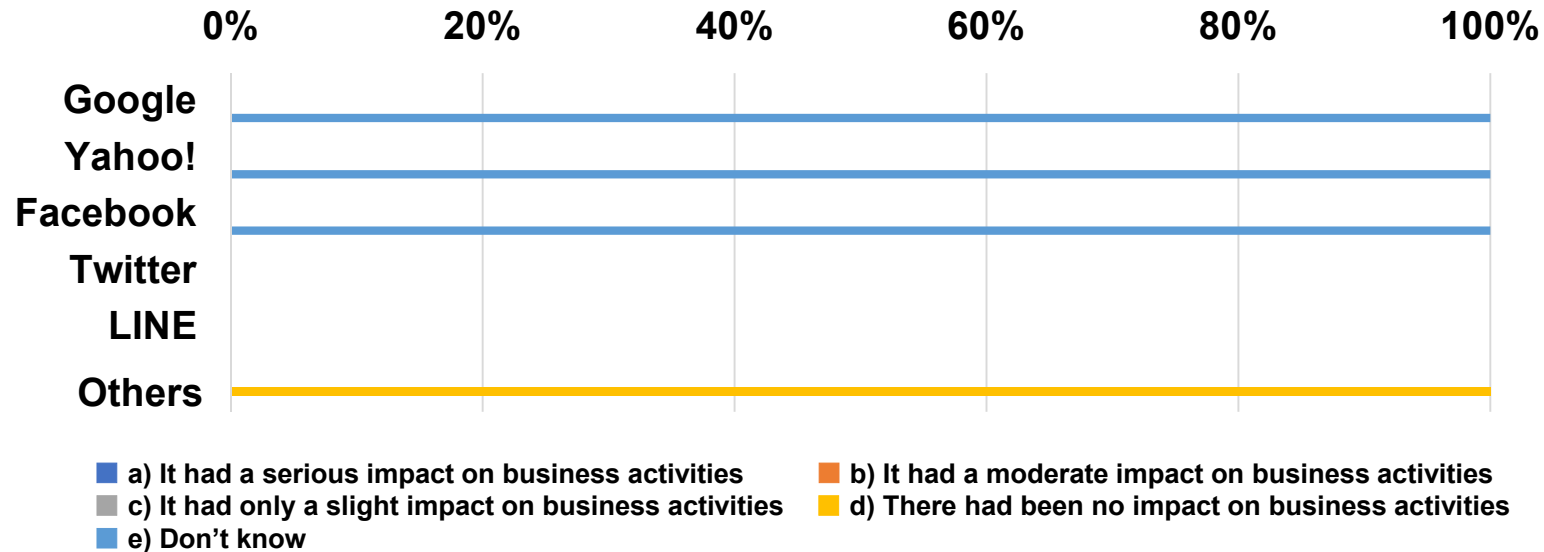
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	-	-	-	-	-	-	-	-	-	-	1	100.0
b) No	-	-	-	-	-	-	-	-	-	-	-	-
c) Don't know	1	100.0	1	100.0	1	100.0	-	-	-	-	-	-
Number of respondents	1	100.0	1	100.0	1	100.0	-	-	-	-	1	100.0

Q11-1-1. (For those who answered “a) Yes” at Q11-1) Was your company satisfied with the explanation? [Select one]



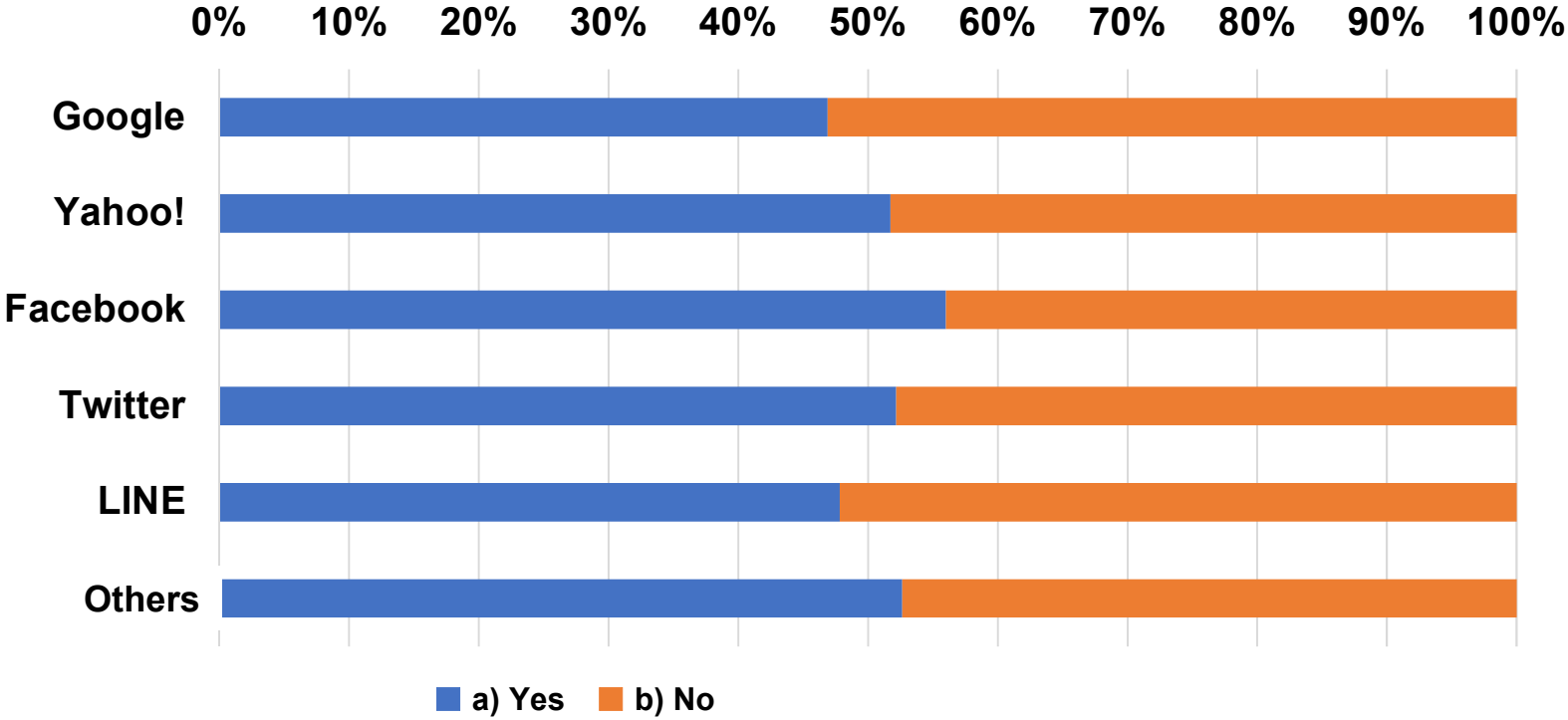
Answers	Google		Yahoo!		Facebook		Twitter		LINE		その他	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	-	-	-	-	-	-	-	-	-	-	1	100.0
b) No	-	-	-	-	-	-	-	-	-	-	-	-
c) Don't know	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	-	-	-	-	-	-	-	-	-	-	1	100.0

Q11-2. (For those who answered a) to c) at Q11) How did being asked to suspend or ban your business activities impact your business activities? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	1	100.0
e) Don't know	1	100.0	1	100.0	1	100.0	-	-	-	-	-	-
Number of respondents	1	100.0	1	100.0	1	100.0	-	-	-	-	1	100.0

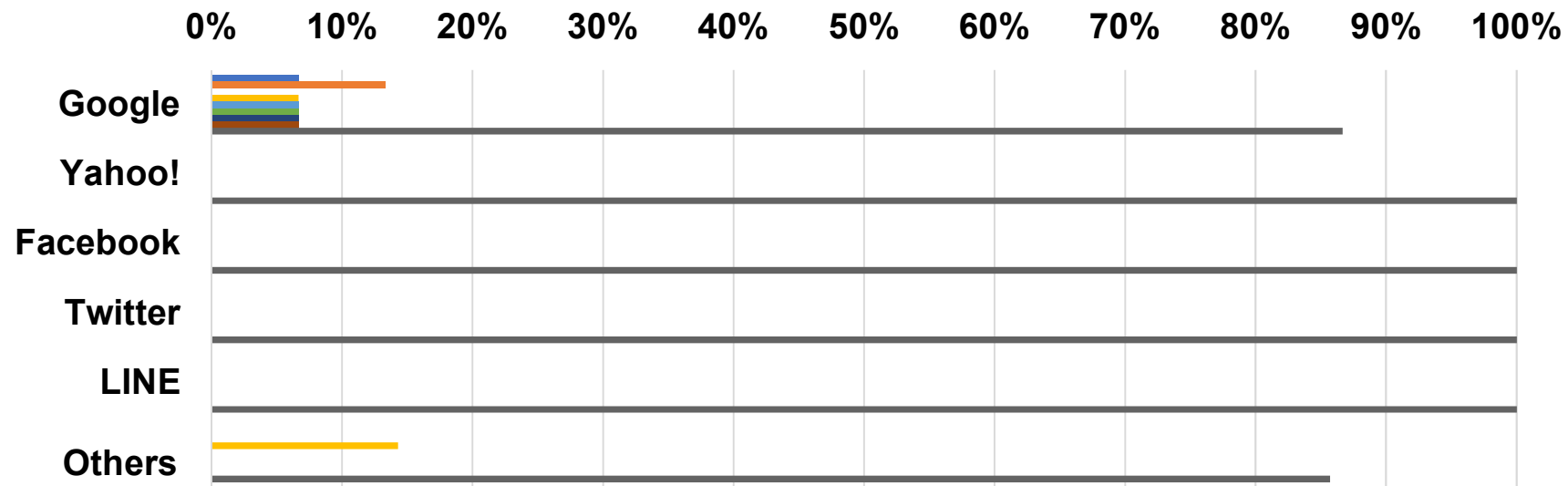
Q12. Regarding the function of ad tech services for publishers provided by digital platform operators, did you sell inventory as an agent (selling inventory, which is mediated through the ad tech services provided by digital platform operators, on behalf of the said digital platform operators) (within three recent fiscal years)? [Select one]



Q12. Regarding the function of ad tech services for publishers provided by digital platform operators, did you sell inventory as an agent (selling inventory, which is mediated through the ad tech services provided by digital platform operators, on behalf of the said digital platform operators) (within three recent fiscal years)? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	15	46.9	15	51.7	14	56.0	12	52.2	11	47.8	10	52.6
b) No	17	53.1	14	48.3	11	44.0	11	47.8	12	52.2	9	47.4
Number of respondents	32	100.0	29	100.0	25	100.0	23	100.0	23	100.0	19	100.0

Q12-1. (For those who answered “a) Yes” at Q12) When selling inventory as an agent, were you requested the following conditions by the said digital platform operators? [Multiple answers accepted]

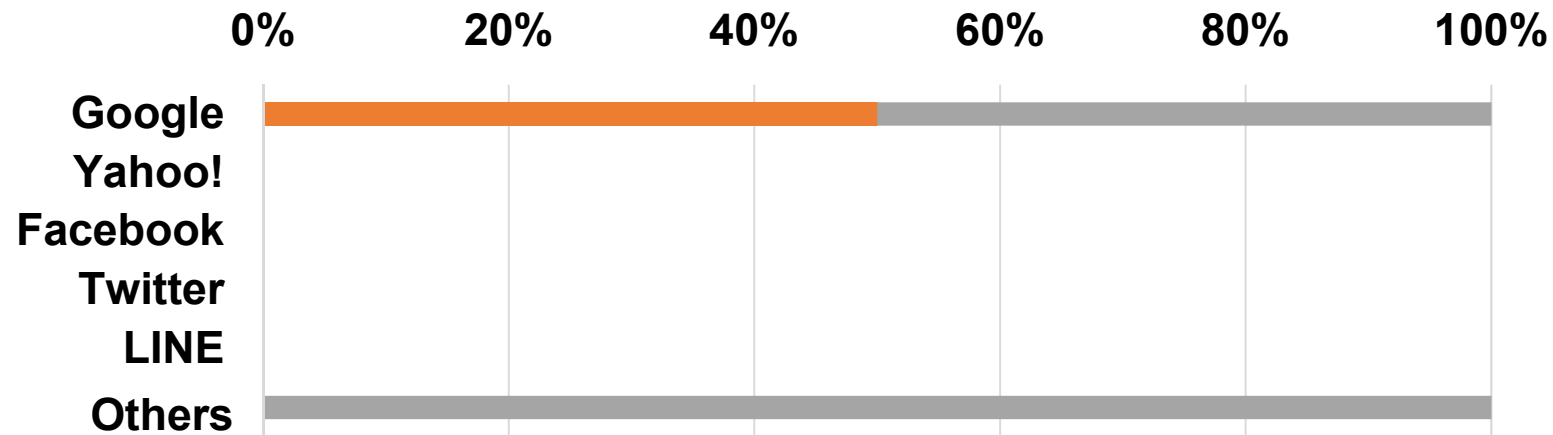


- a) Make the percentage of the inventory sold as an agent to overall inventory larger than a certain level
- b) It is necessary to have your customers preferentially use the service to be sold as an agent over your original services
- c) Restrict any trade with competitors of the said digital platform operators
- d) Restrict business activities with some publishers
- e) Restrict implementation of header bidding functions as your original services
- f) You are required to add your own unique value-added service to the services you sell as an agent
- g) When you implement new functions as your original services, it is necessary to share information of the new functions to the said digital platform operators
- h) Other (Select this option if there is any concerns excluding the above a) to g) while selling inventory as an agent)
- i) You have never been requested any conditions

**Q12-1. (For those who answered “a) Yes” at Q12) When selling inventory as an agent, were you imposed the following conditions by the said digital platform operators?
[Multiple answers accepted]**

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Make the percentage of the inventory sold as an agent to overall inventory larger than a certain level	1	6.7	-	-	-	-	-	-	-	-	-	-
b) It is necessary to have your customers preferentially use the service to be sold as an agent over your original services	2	13.3	-	-	-	-	-	-	-	-	-	-
c) Restrict any trade with competitors of the said digital platform operators	-	-	-	-	-	-	-	-	-	-	-	-
d) Restrict business activities with some publishers	1	6.7	-	-	-	-	-	-	-	-	1	14.3
e) Restrict implementation of header bidding functions as your original services	1	6.7	-	-	-	-	-	-	-	-	-	-
f) You are required to add your own unique value-added service to the services you sell as an agent	1	6.7	-	-	-	-	-	-	-	-	-	-
g) When you implement new functions as your original services, it is necessary to share information of the new functions to the said digital platform operators	1	6.7	-	-	-	-	-	-	-	-	-	-
h) Other (Select this option if there is any concerns excluding the above a) to g) while selling inventory as an agent)	1	6.7	-	-	-	-	-	-	-	-	-	-
i) You have never been requested any conditions	13	86.7	15	100.0	14	100.0	12	100.0	11	100.0	6	85.7
Number of respondents	15	-	15	-	14	-	12	-	11	-	7	-

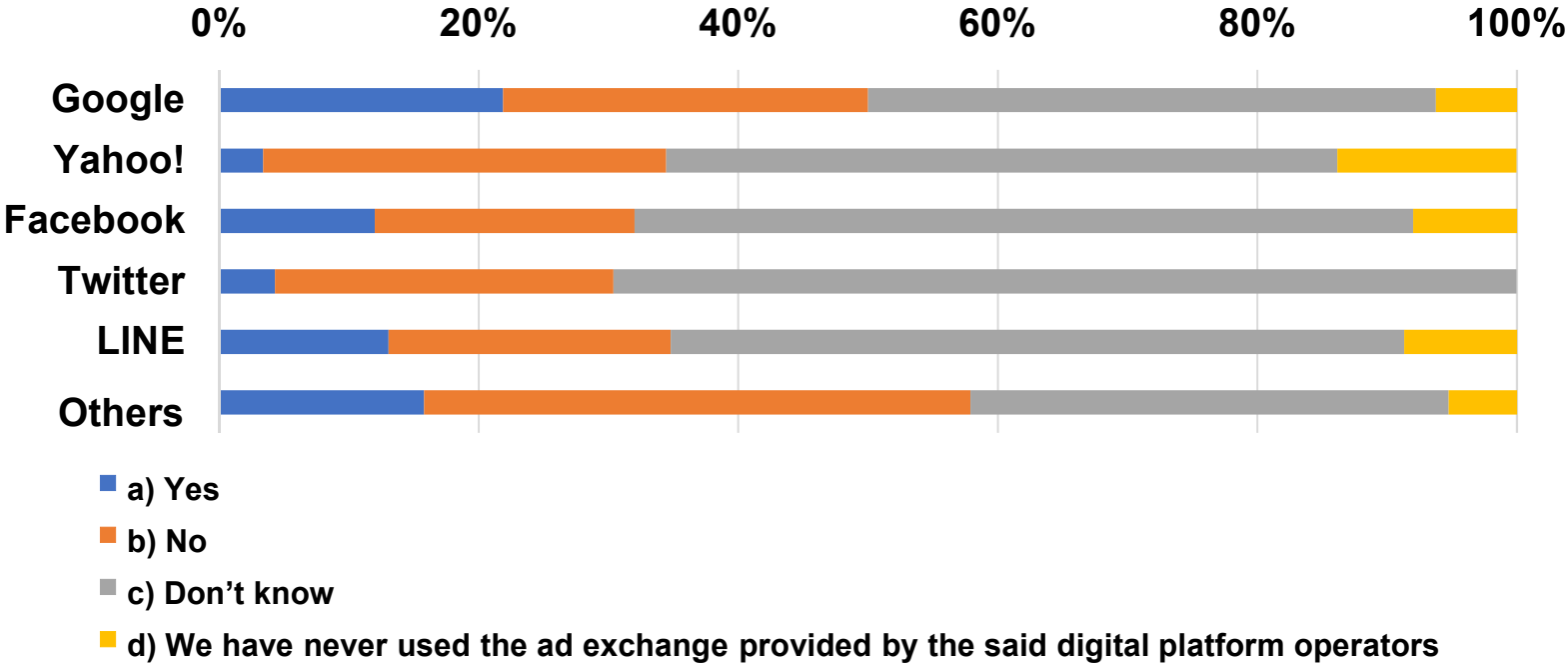
Q12-1-2. (For those who answered a) to h) at Q12-1) How imposing the conditions impact your business activities? [Select one]



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	1	50.0	-	-	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	1	50.0	-	-	-	-	-	-	-	-	1	100.0
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	2	100.0	-	-	-	-	-	-	-	-	1	100.0

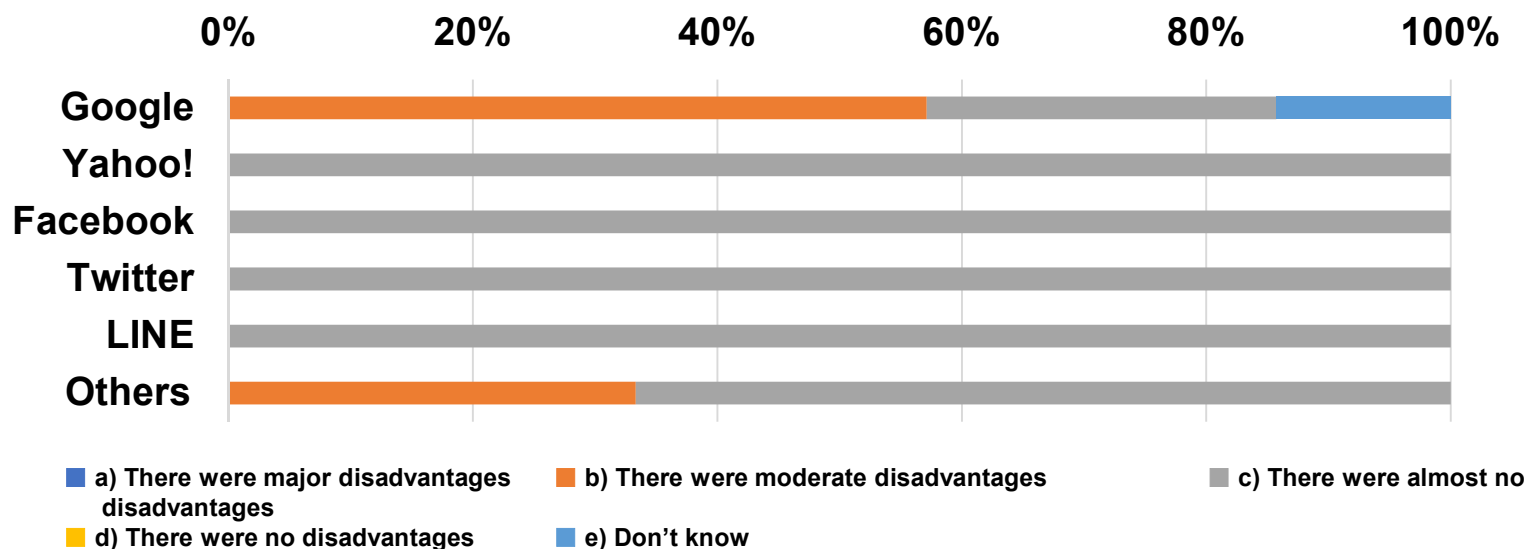
Q13. In ad exchanges provided by digital platform operators, have you felt that the said digital platform operators control minimum bidding prices (floor prices) ? [Select one]



**Q13. In ad exchanges provided by digital platform operators, have you felt that the said digital platform operators control minimum bidding prices (floor prices) ?
[Select one]**

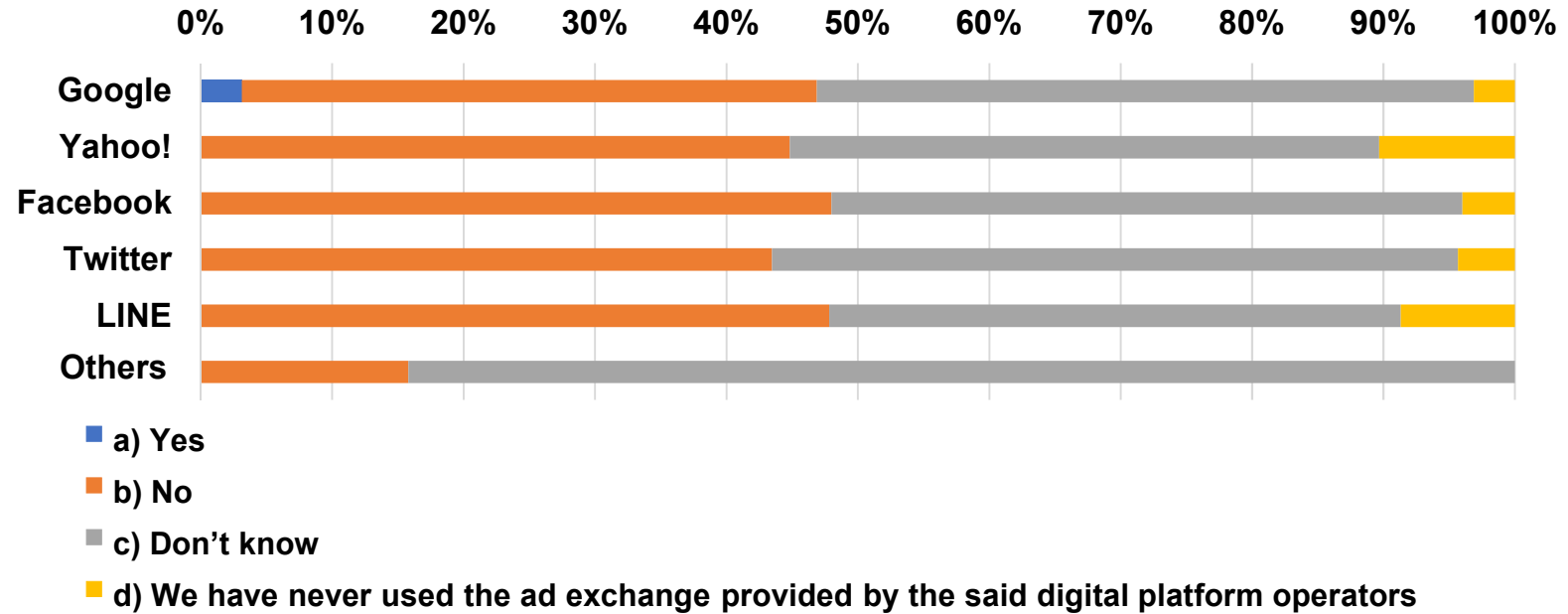
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	7	21.9	1	3.4	3	12.0	1	4.3	3	13.0	3	15.8
b) No	9	28.1	9	31.0	5	20.0	6	26.1	5	21.7	8	42.1
c) Don't know	14	43.8	15	51.7	15	60.0	16	69.6	13	56.5	7	36.8
d) We have never used ad exchange provided by the said digital platform operators	2	6.3	4	13.8	2	8.0	-	-	2	8.7	1	5.3
Number of respondents	32	100.0	29	100.0	25	100.0	23	100.0	23	100.0	19	100.0

Q13-2. (For those who answered “a) Yes” at Q13) Did your company suffer disadvantages due to this activity? [Select one]



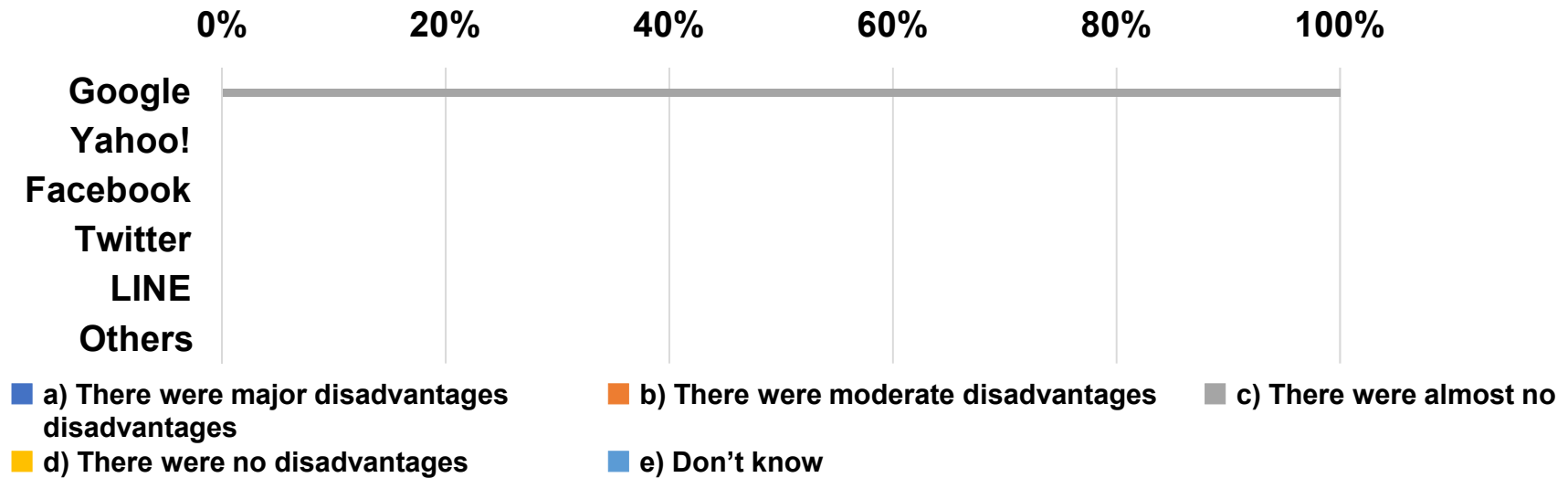
Answers	Google		Yahoo!		Facebook		Twitter		LINE		その他	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
b) There were moderate disadvantages	4	57.1	-	-	-	-	-	-	-	-	2	33.3
c) There were almost no disadvantages	2	28.6	1	100.0	3	100.0	1	100.0	3	100.0	4	66.7
d) There were no disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	1	14.3	-	-	-	-	-	-	-	-	-	-
Number of respondents	7	100.0	1	100.0	3	100.0	1	100.0	3	100.0	6	100.0

**Q14. When an inventory auction is conducted in ad exchanges provided by digital platform operators, have you felt that the said digital platform operators have a grasp on bidding price of other bidders beforehand and use this information in these auctions?
[Select one]**



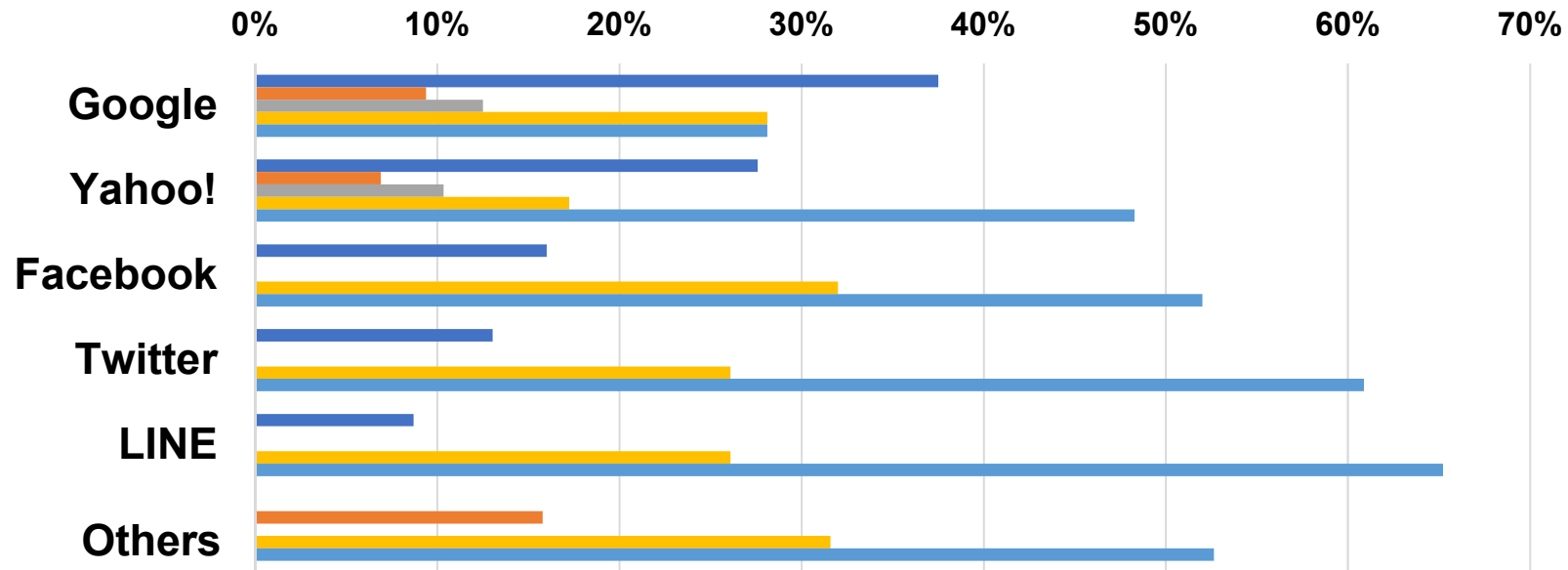
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	1	3.1	-	-	-	-	-	-	-	-	-	-
b) No	14	43.8	13	44.8	12	48.0	10	43.5	11	47.8	3	15.8
c) Don't know	16	50.0	13	44.8	12	48.0	12	52.2	10	43.5	16	84.2
d) We have never used the ad exchange provided by the said digital platform operators	1	3.1	3	10.3	1	4.0	1	4.3	2	8.7	-	-
Number of respondents	32	100.0	29	100.0	25	100.0	23	100.0	23	100.0	19	100.0

Q14-2. (For those who answered “a) Yes” at Q14) Did your company suffer disadvantages due to this activity? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
b) There were moderate disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
c) There were almost no disadvantages	1	100.0	-	-	-	-	-	-	-	-	-	-
d) There were no disadvantages	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	1	100.0	-	-	-	-	-	-	-	-	-	-

Q15. When part of the inventory sold using the ad tech service provided by digital platform operators is certified as ad fraud, what kind of information will be disclosed by the said digital platform operators regarding the advertisements related to the said inventory? Please select from the following. [Multiple answers accepted]

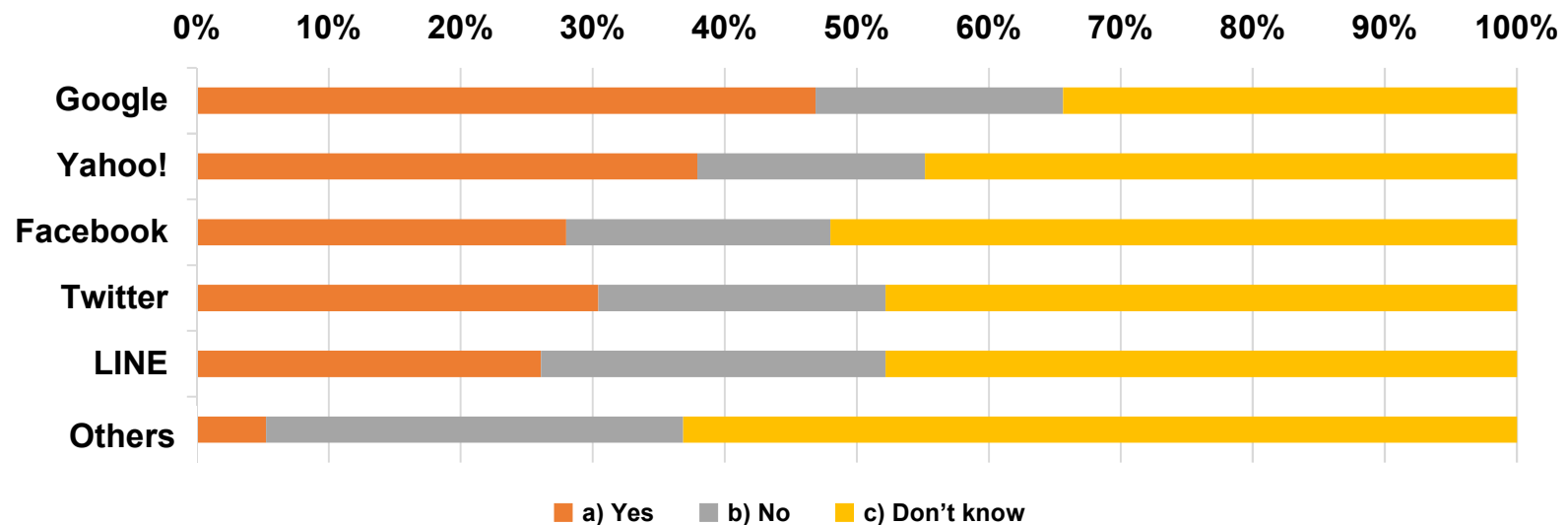


- a) Advertising charges for ad fraud certified
- b) The name of publishers that hold the inventory that has been certified as ad fraud
- c) Timing of distribution to publishers that hold the inventory that has been certified as ad fraud
- d) No information disclosed
- e) Never experienced an ad fraud-related event

Q15. When part of the inventory sold using the ad tech service provided by digital platform operators is certified as ad fraud, what kind of information will be disclosed by the said digital platform operators regarding the advertisements related to the said inventory? Please select from the following. [Multiple answers accepted]

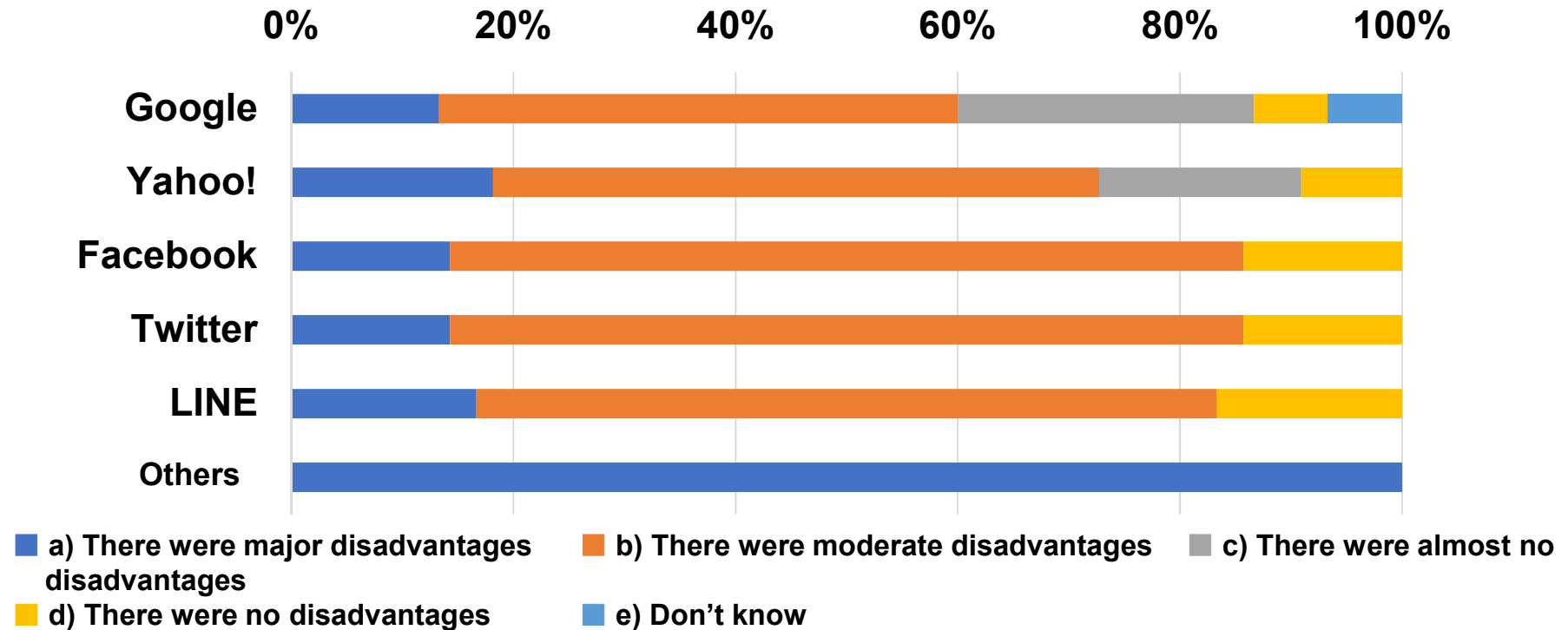
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Advertising charges for ad fraud certified	12	37.5	8	27.6	4	16.0	3	13.0	2	8.7	-	-
b) The name of publishers that hold the inventory that has been certified as ad fraud	3	9.4	2	6.9	-	-	-	-	-	-	3	15.8
c) Timing of distribution to publishers that hold the inventory that has been certified as ad fraud	4	12.5	3	10.3	-	-	-	-	-	-	-	-
d) No information disclosed	9	28.1	5	17.2	8	32.0	6	26.1	6	26.1	6	31.6
e) Never experienced an ad fraud-related event	9	28.1	14	48.3	13	52.0	14	60.9	15	65.2	10	52.6
Number of respondents	32	-	29	-	25	-	23	-	23	-	19	-

Q16. When part of the inventory sold using the ad tech service provided by digital platform operators is certified as ad fraud, do you have any complaint against information not disclosed or disclosed by the said digital platform operators regarding the advertisements related to the said inventory? Please select from the following. [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	15	46.9	11	37.9	7	28.0	7	30.4	6	26.1	1	5.3
b) No	6	18.8	5	17.2	5	20.0	5	21.7	6	26.1	6	31.6
c) Don't know	11	34.4	13	44.8	13	52.0	11	47.8	11	47.8	12	63.2
Number of respondents	32	100.0	29	100.0	25	100.0	23	100.0	23	100.0	19	100.0

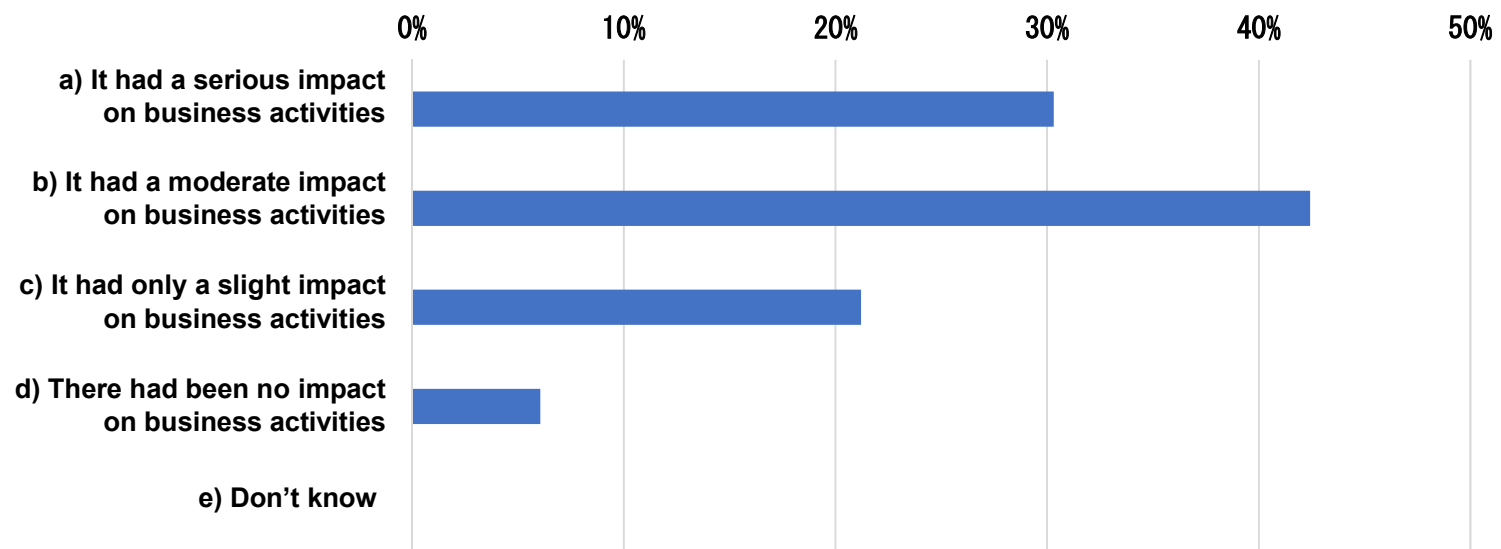
Q16-1. (For those who answered “a) Yes” at Q16) Did your company suffer disadvantages due to information not disclosed or insufficient information? [Select one]



**Q16-1. (For those who answered “a) Yes” at Q16) Did your company suffer disadvantages due to information not disclosed or insufficient information?
[Select one]**

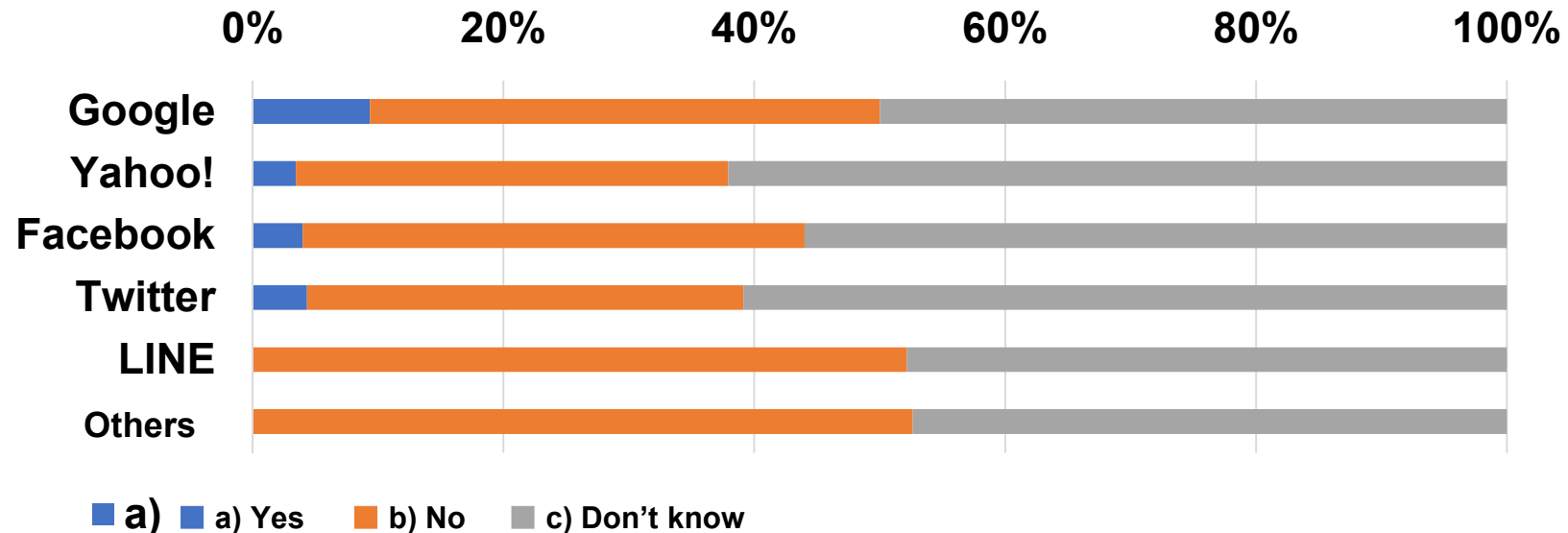
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	2	13.3	2	18.2	1	14.3	1	14.3	1	16.7	1	100.0
b) There were moderate disadvantages	7	46.7	6	54.5	5	71.4	5	71.4	4	66.7	-	-
c) There were almost no disadvantages	4	26.7	2	18.2	-	-	-	-	-	-	-	-
d) There were no disadvantages	1	6.7	1	9.1	1	14.3	1	14.3	1	16.7	-	-
e) Don't know	1	6.7	-	-	-	-	-	-	-	-	-	-
Number of respondents	15	100.0	11	100.0	7	100.0	7	100.0	6	100.0	1	100.0

Q17. There are movements to restrict the use of cookies provided by web browsers for the purpose of protecting privacy, etc. How do you think restricting the use of cookies impact your business activities? [Select one]



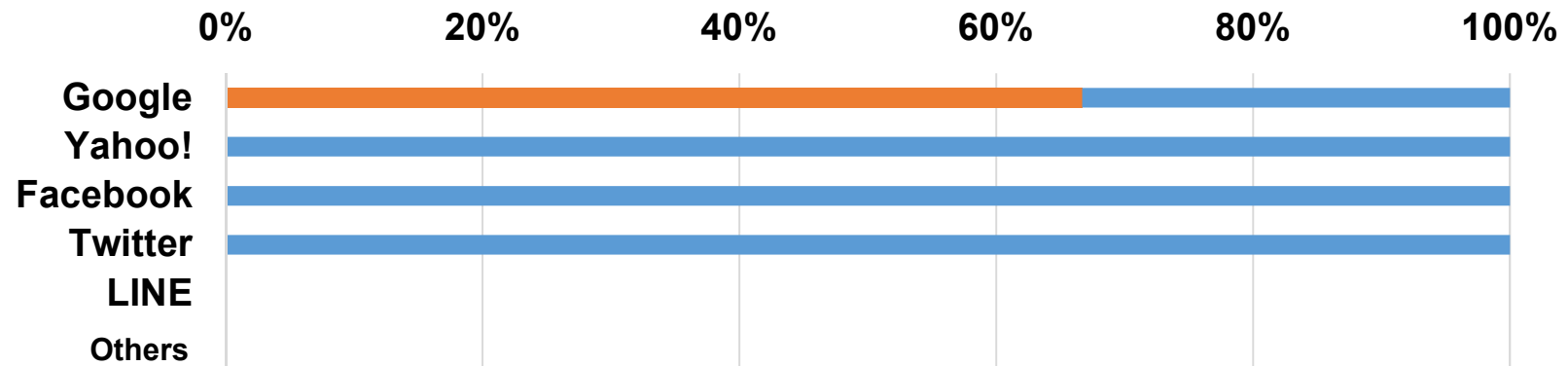
Answers	Number od answers	Ratio (%)
a) It had a serious impact on business activities	10	30.3
b) It had a moderate impact on business activities	14	42.4
c) It had only a slight impact on business activities	7	21.2
d) There had been no impact on business activities	2	6.1
e) Don't know	-	-
Number of respondents	33	100.0

Q18. When using ad tech services provided by digital platform operators, have you been restricted to access to the data necessary for the digital advertising business (e.g. data used to verify advertising effectiveness) by the said digital platform operators? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		その他	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	3	9.4	1	3.4	1	4.0	1	4.3	-	-	-	-
b) No	13	40.6	10	34.5	10	40.0	8	34.8	12	52.2	10	52.6
c) Don't know	16	50.0	18	62.1	14	56.0	14	60.9	11	47.8	9	47.4
Number of respondents	32	100.0	29	100.0	25	100.0	23	100.0	23	100.0	19	100.0

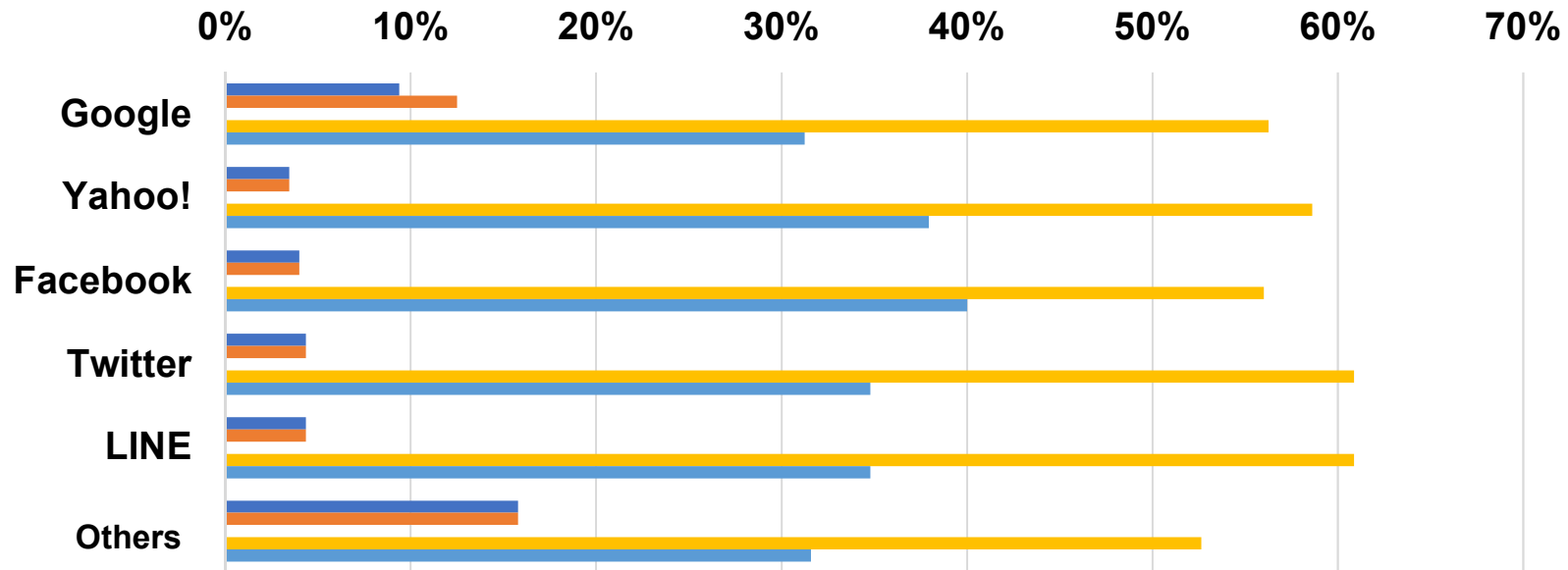
Q18-2. (For those who answered “a) yes” at Q12) How does this conduct impact your business activities? [Select one]



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	2	66.7	-	-	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
d) There had been no impact on business	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	1	33.3	1	100.0	1	100.0	1	100.0	-	-	-	-
Number of respondents	3	100.0	1	100.0	1	100.0	1	100.0	-	-	-	-

Q19. Have you experienced any of the following when using a professional service provider to connect with the ad tech services provided by digital platform operators? [Multiple answers accepted]

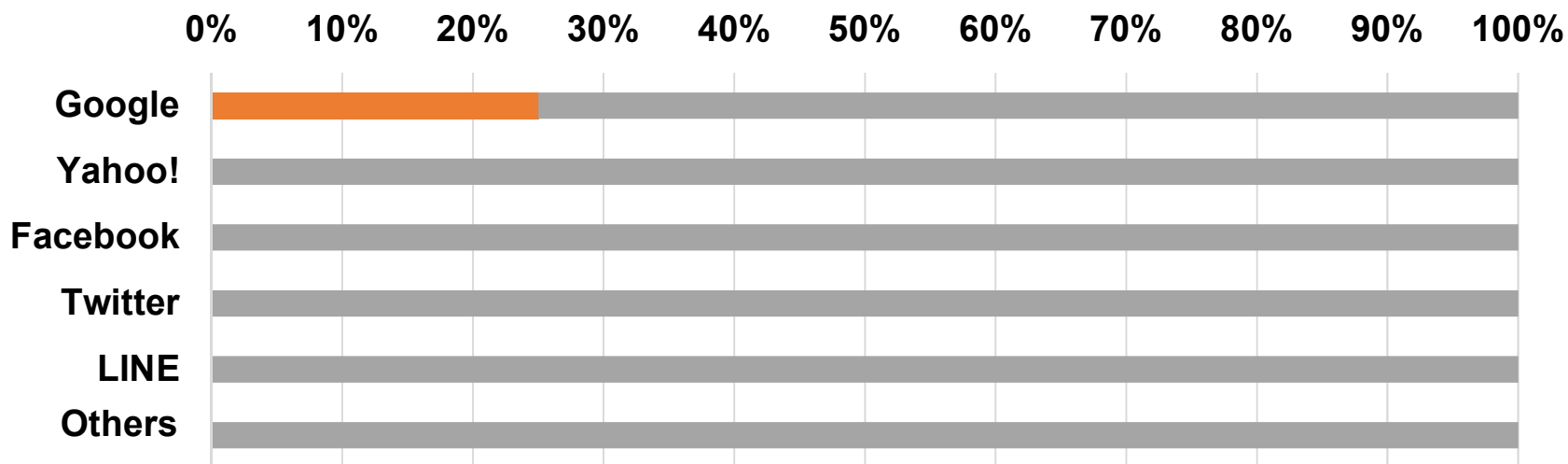


- a) You pay for the connection fee that the said digital platform operators should bear
- b) The deviation rate measured by the digital platform operators was adopted instead of the deviation rate measured by the connection operator
- c) Other (Select this option if there is any concerns excluding the above a) or b) regarding the connection operators)
- d) Never experienced conducts listed above
- e) Never used a professional service provider to connect with the said digital platform operators

Q19. Have you experienced any of the following when using a professional service provider to connect with the ad tech services provided by digital platform operators? [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) You pay for the connection fee that the said digital platform operators should bear	3	9.4	1	3.4	1	4.0	1	4.3	1	4.3	3	15.8
b) The deviation rate measured by the digital platform operators was adopted instead of the deviation rate measured by the connection operator	4	12.5	1	3.4	1	4.0	1	4.3	1	4.3	3	15.8
c) Other (Select this option if there is any concerns excluding the above a) or b) regarding the connection operators.)	-	-	-	-	-	-	-	-	-	-	-	-
d) Never experienced conducts listed above	18	56.3	17	58.6	14	56.0	14	60.9	14	60.9	10	52.6
e) Never used a professional service provider to connect with the said digital platform operators	10	31.3	11	37.9	10	40.0	8	34.8	8	34.8	6	31.6
Number of respondents	32	-	29	-	25	-	23	-	23	-	19	-

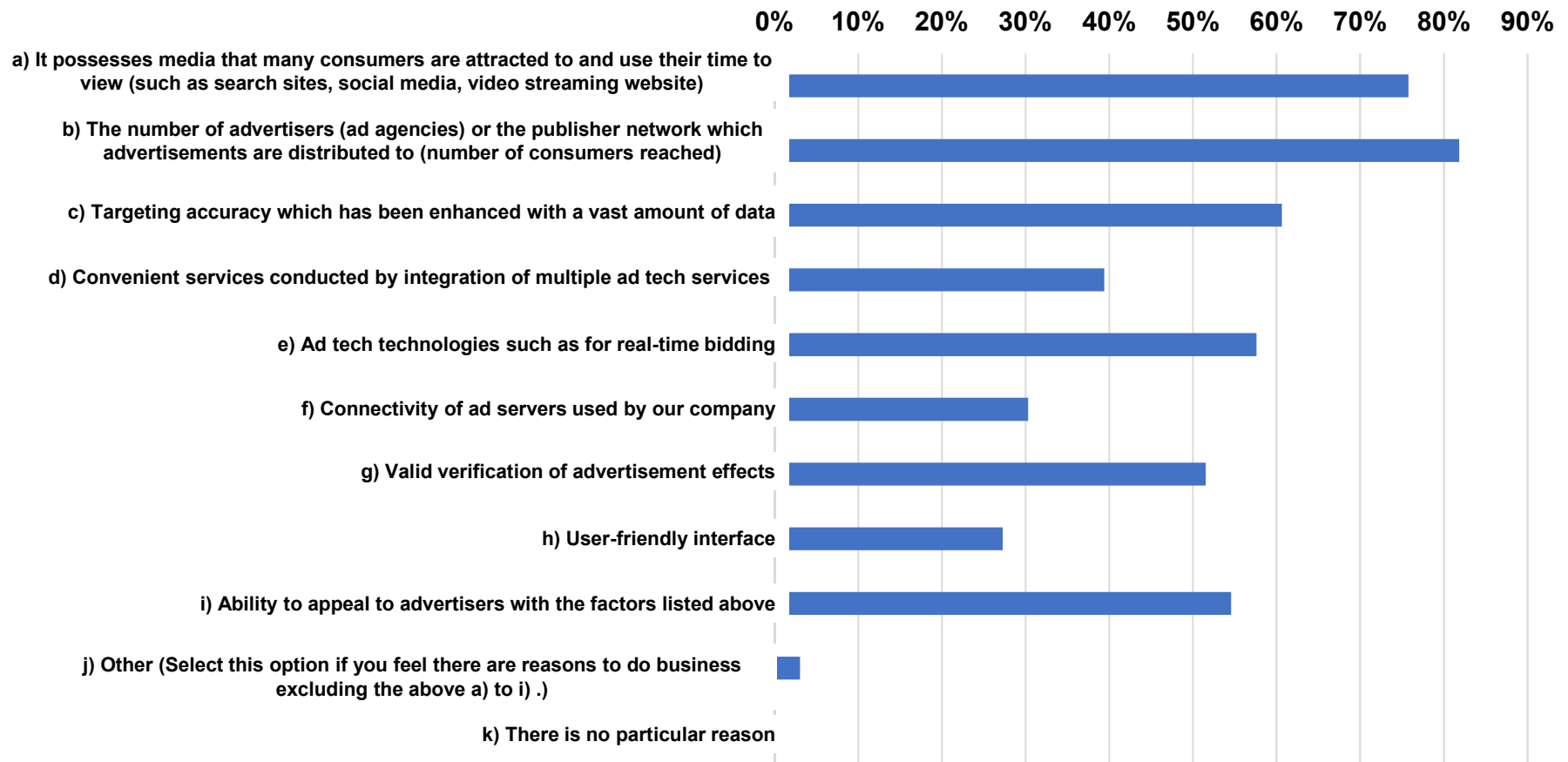
Q19-2. (For those who answered a) to c) s at Q19) How does this conduct impact your business activities? [Select one]



- a) It had a serious impact on business activities
- b) It had a moderate impact on business activities
- c) It had only a slight impact on business activities
- d) There had been no impact on business activities
- e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	1	25.0	-	-	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	3	75.0	1	100.0	1	100.0	1	100.0	1	100.0	3	100.0
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	-	-	-	-	-	-	-	-	-	-	-	-
Number of respondents	4	100.0	1	100.0	1	100.0	1	100.0	1	100.0	3	100.0

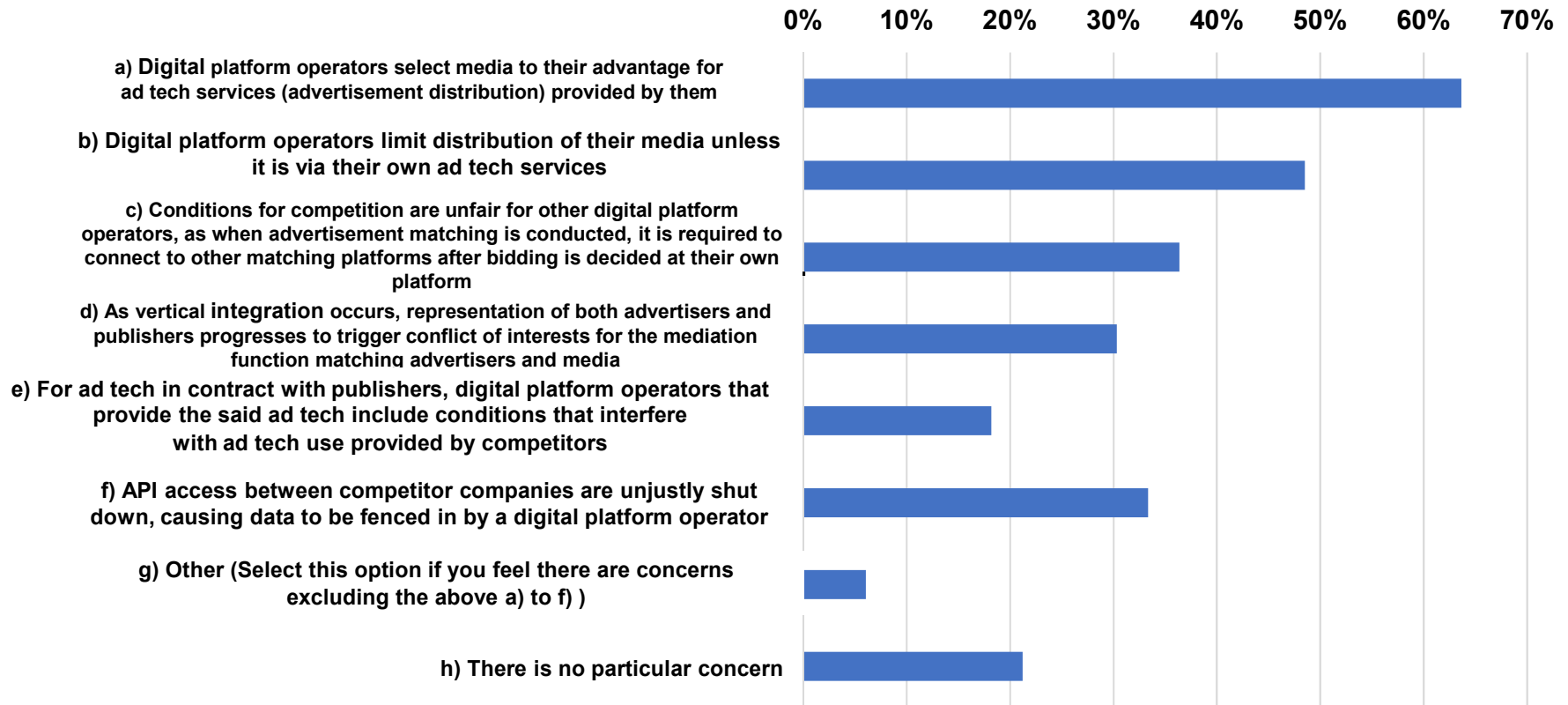
Q20. What are the reasons your company conducts direct business transactions with your current digital platform operator? Please select from the following. [Multiple answers accepted]



Q20. What are the reasons your company conducts direct business transactions with your current digital platform operator? Please select from the following. [Multiple answers accepted]

Answers	Number of answers	Ratio (%)
a) It possesses media that many consumers are attracted to and use their time to view (such as search sites, social media, video streaming website)	25	75.8
b) The number of advertisers (ad agencies) or the publisher network which advertisements are distributed to (number of consumers reached)	27	81.8
c) Targeting accuracy which has been enhanced with a vast amount of data	20	60.6
d) Convenient services conducted by integration of multiple ad tech services	13	39.4
e) Ad tech technologies such as for real-time bidding	19	57.6
f) Connectivity of ad servers used by our company	10	30.3
g) Valid verification of advertisement effects	17	51.5
h) User-friendly interface	9	27.3
i) Ability to appeal to advertisers with the factors listed above	18	54.5
j) Other (Select this option if you feel there are reasons to do business excluding the above a) to i))	1	3.0
k) There is no particular reason	-	-
Number of respondents	33	-

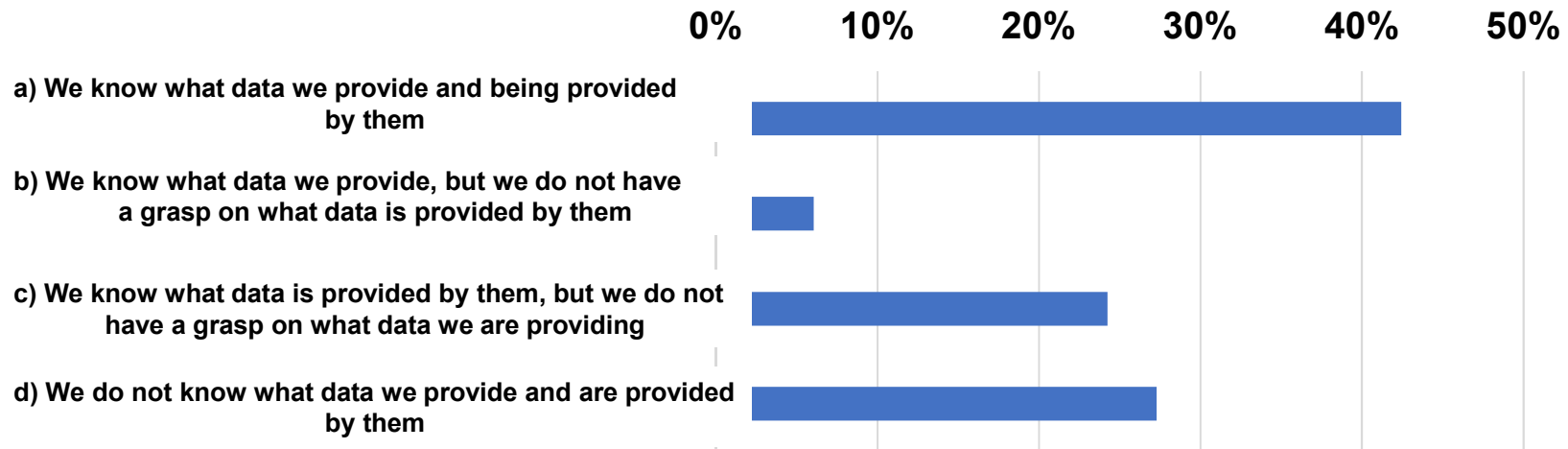
Q21. Currently, in the digital advertising market, there seems to be a certain movement (vertical integration); digital platform operators manage powerful mediums while distributing advertisements (matching) using ad tech in the backdrop of the said media’s power. Do you have any concerns about this progression of vertical integration? If so, what concerns do you have? Please select from the following. [Multiple answers accepted]



Q21. Currently, in the digital advertising market, there seems to be a certain movement (vertical integration); digital platform operators manage powerful mediums while distributing advertisements (matching) using ad tech in the backdrop of the said media's power. Do you have any concerns about this progression of vertical integration? If so, what concerns do you have? Please select from the following. [Multiple answers accepted]

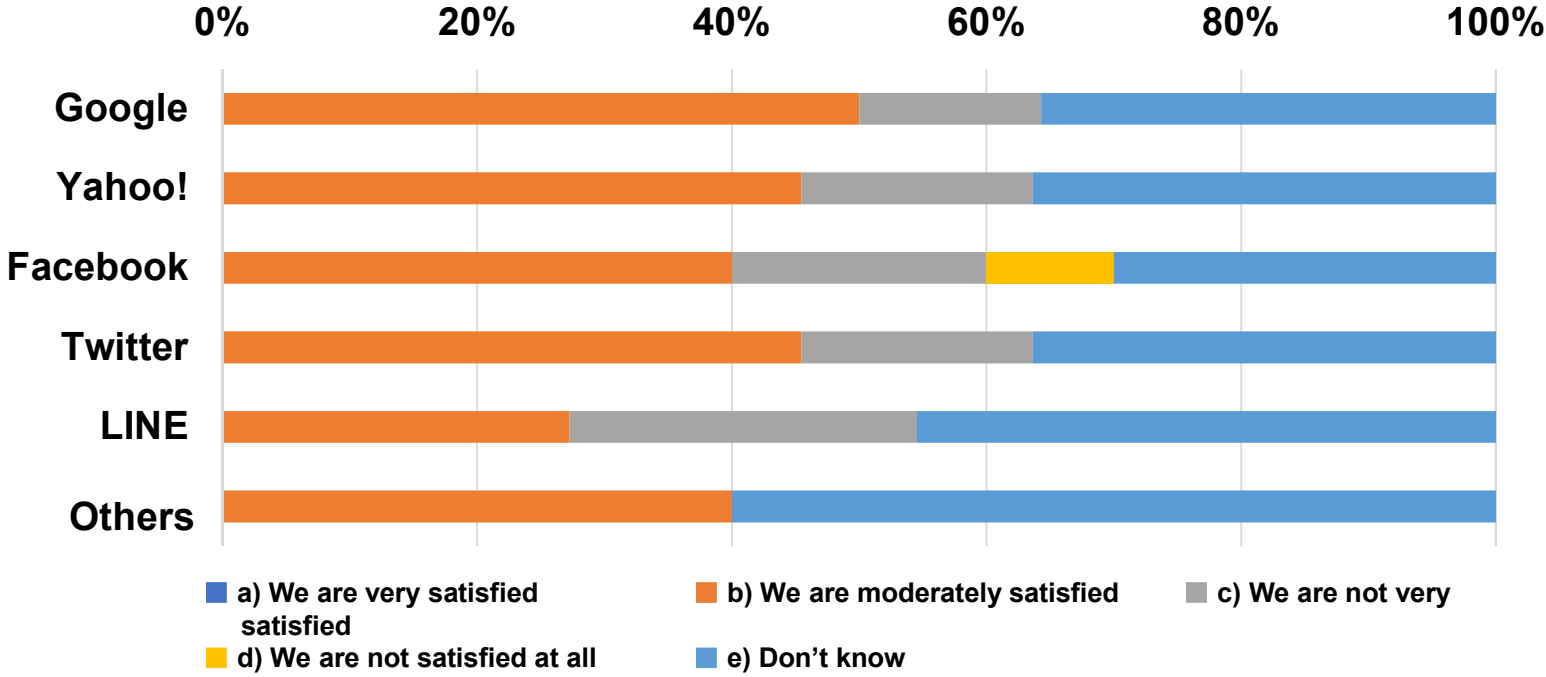
Answers	Number of answers	Ratio (%)
a) Digital platform operators select media to their advantage for ad tech services (advertisement distribution) provided by them	21	63.6
b) Digital platform operators limit distribution of their media unless it is via their own ad tech services	16	48.5
c) Conditions for competition are unfair for other digital platform operators, as when advertisement matching is conducted, it is required to connect to other matching platforms after bidding is decided at their own platform	12	36.4
d) As vertical integration occurs, representation of both advertisers and publishers progresses to trigger conflict of interests for the mediation function matching advertisers and media	10	30.3
e) For ad tech in contract with publishers, digital platform operators that provide the said ad tech include conditions that interfere with ad tech use provided by competitors	6	18.2
f) API access between competitor companies are unjustly shut down, causing data to be fenced in by a digital platform operator	11	33.3
g) Other (Select this option if you feel there are concerns excluding the above a) to f) .)	2	6.1
h) There is no particular concern	7	21.2
Number of respondents	33	-

Q22. When using ad tech services provided by digital platform operators, do you have a grasp on what type of data you provide to them, or what type of data is provided from them? [Select one]



Answers	Number of answers	Ratio (%)
a) We know what data we provide and being provided by them	14	42.4
b) We know what data we provide, but we do not have a grasp on what data is provided by them	2	6.1
c) We know what data is provided by them, but we do not have a grasp on what data we are providing	8	24.2
d) We do not know what data we provide and are provided by them	9	27.3
Number of respondents	33	100.0

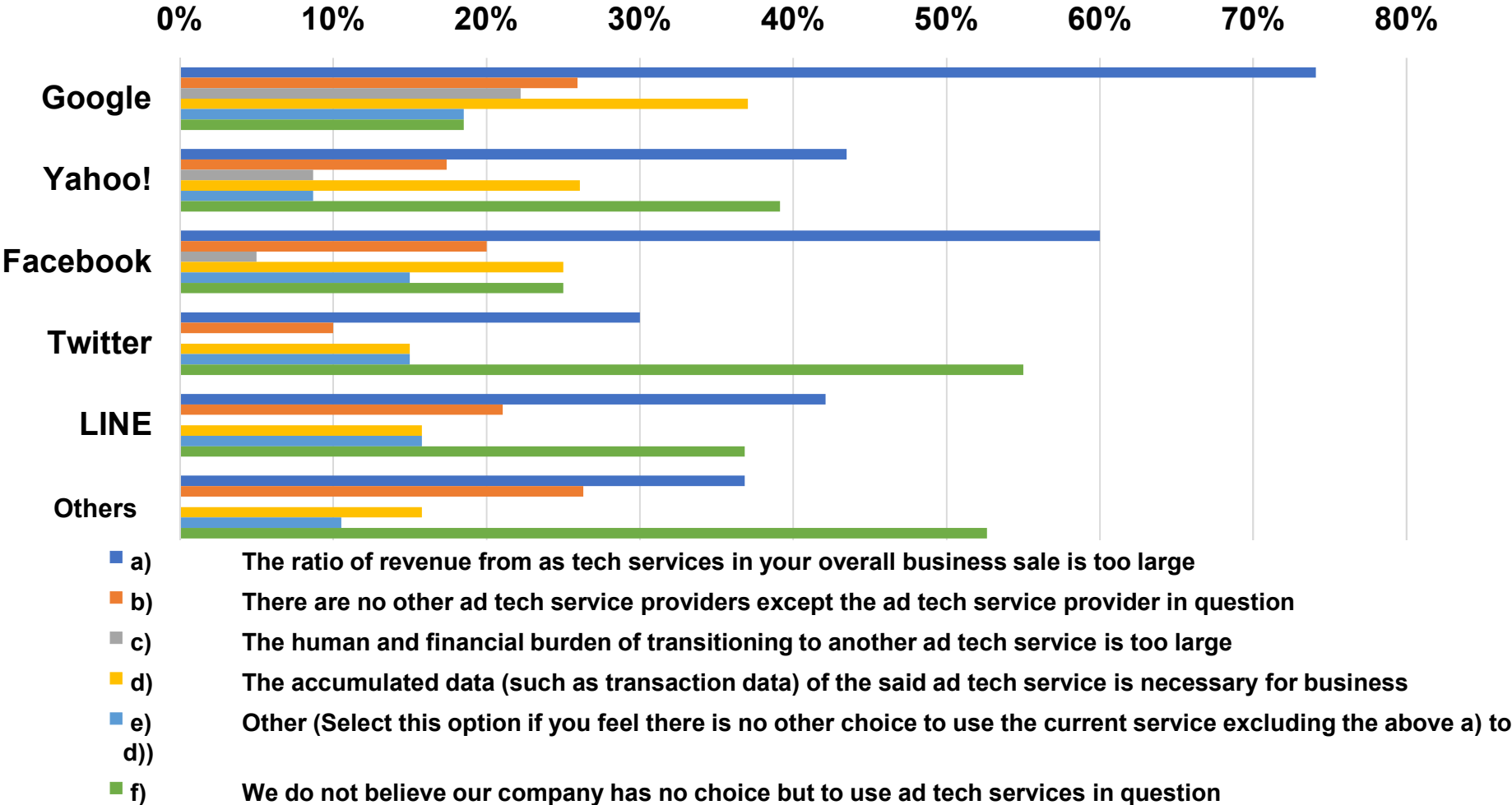
Q22-3. (For those who answered “a) We know what data we provide and are being provided by them” at Q22) Are you satisfied with the data provided by the digital platform operation when compared to the data you provide to them? [Select one]



Q22-3. (For those who answered “a) We know what data we provide and are being provided by them” at Q22) Are you satisfied with the data provided by the digital platform operation when compared to the data you provide to them? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We are very satisfied	-	-	-	-	-	-	-	-	-	-	-	-
b) We are moderately satisfied	7	50.0	5	45.5	4	40.0	5	45.5	3	27.3	4	40.0
c) We are not very satisfied	2	14.3	2	18.2	2	20.0	2	18.2	3	27.3	-	-
d) We are not satisfied at all	-	-	-	-	1	10.0	-	-	-	-	-	-
e) Don't know	5	35.7	4	36.4	3	30.0	4	36.4	5	45.5	6	60.0
Number of respondents	14	100.0	11	100.0	10	100.0	11	100.0	11	100.0	10	100.0

Q23. (For those to answered a) or b) for at least one question out of Q7-2, Q8-2, Q9-2, Q10-3, Q11-2, Q12-1-2, Q13-2, Q14-2, Q16-1, Q17, Q18-2, and Q19-2) This question is for companies who answered they have a certain amount of disadvantageous effects due to actions taken by digital platform operators. Do you believe your company has no choice but to use ad tech services offered by digital platform operators? If so, please select the reasons from the following. [Multiple answers accepted]

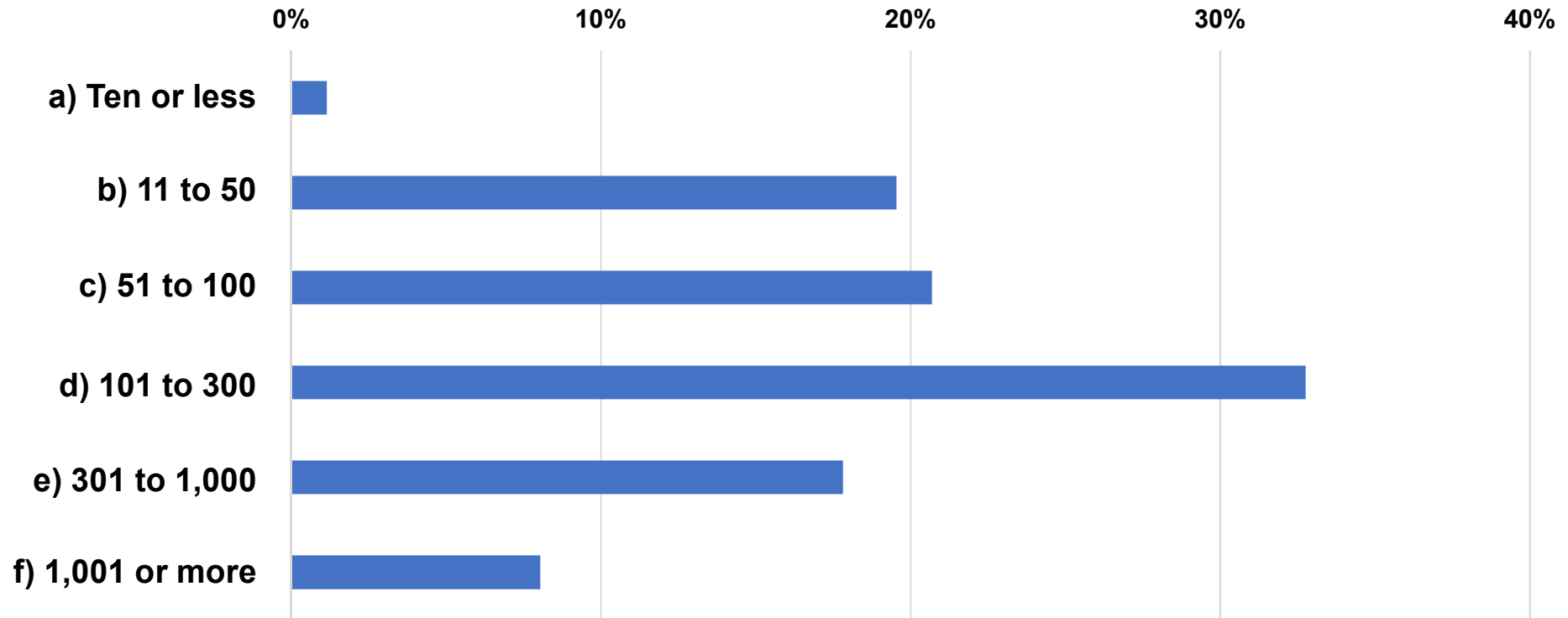


Q23. (For those to answered a) or b) for at least one question out of Q7-2, Q8-2, Q9-2, Q10-3, Q11-2, Q12-1-2, Q13-2, Q14-2, Q16-1, Q17, Q18-2, and Q19-2) This question is for companies who answered they have a certain amount of disadvantageous effects due to actions taken by digital platform operators. Do you believe your company has no choice but to use ad tech services offered by digital platform operators? If so, please select the reasons from the following. [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		others	
	Number of answer	Ratio (%)	Number of answer	Ratio (%)	Number of answer	Ratio (%)	Number of answer	Ratio (%)	Number of answer	Ratio (%)	Number of answer	Ratio (%)
a) The ratio of revenue from as tech services in your overall business sale is too large	20	74.1	10	43.5	12	60.0	6	30.0	8	42.1	7	36.8
b) There are no other ad tech service providers except the ad tech service provider in question	7	25.9	4	17.4	4	20.0	2	10.0	4	21.1	5	26.3
c) The human and financial burden of transitioning to another ad tech service is too large	6	22.2	2	8.7	1	5.0	-	-	-	-	-	-
d) The accumulated data (such as transaction data) of the said ad tech service is necessary for business	10	37.0	6	26.1	5	25.0	3	15.0	3	15.8	3	15.8
e) Other (Select this option if you feel there is no other choice to use the current service excluding the above a) to d))	5	18.5	2	8.7	3	15.0	3	15.0	3	15.8	2	10.5
f) We do not believe our company has no choice but to use ad tech services in question	5	18.5	9	39.1	5	25.0	11	55.0	7	36.8	10	52.6
Number of respondents	27	-	23	-	20	-	20	-	19	-	19	-

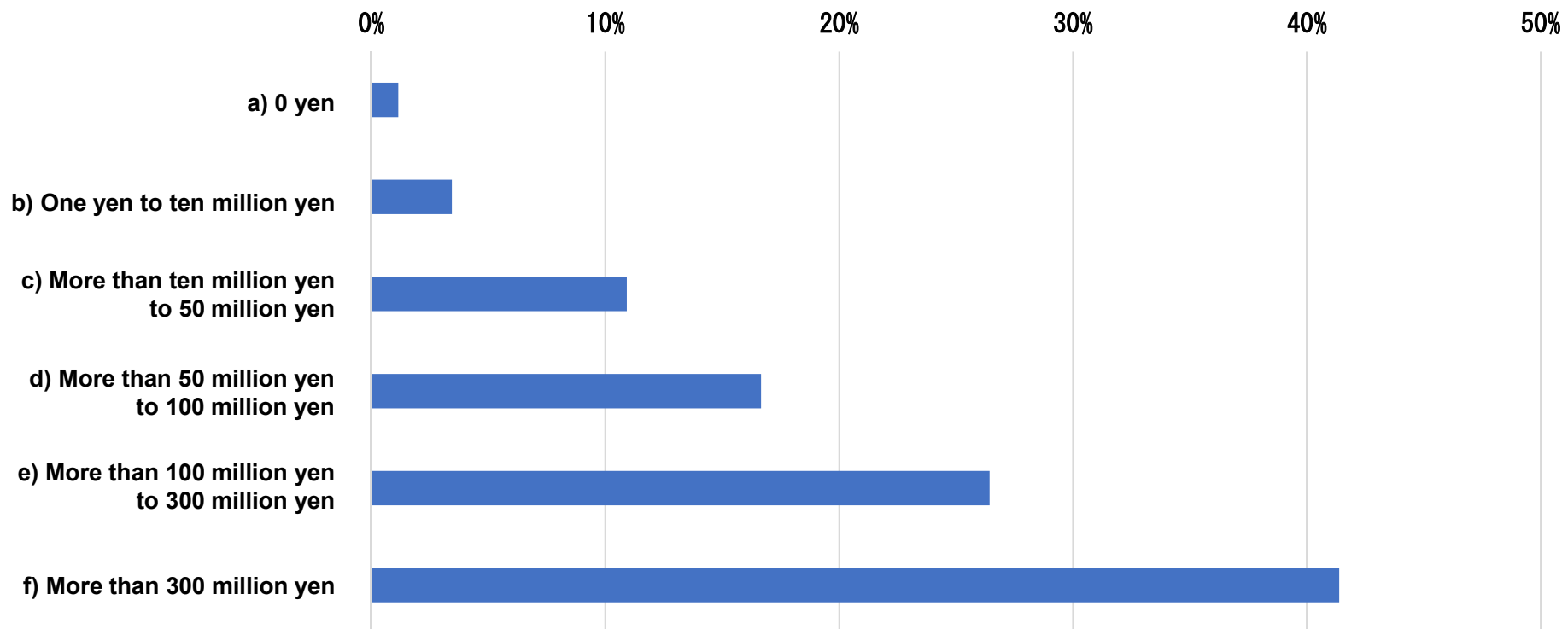
Questionnaire for publishers

Q1. What is the total number of employees in your company? [Select one]



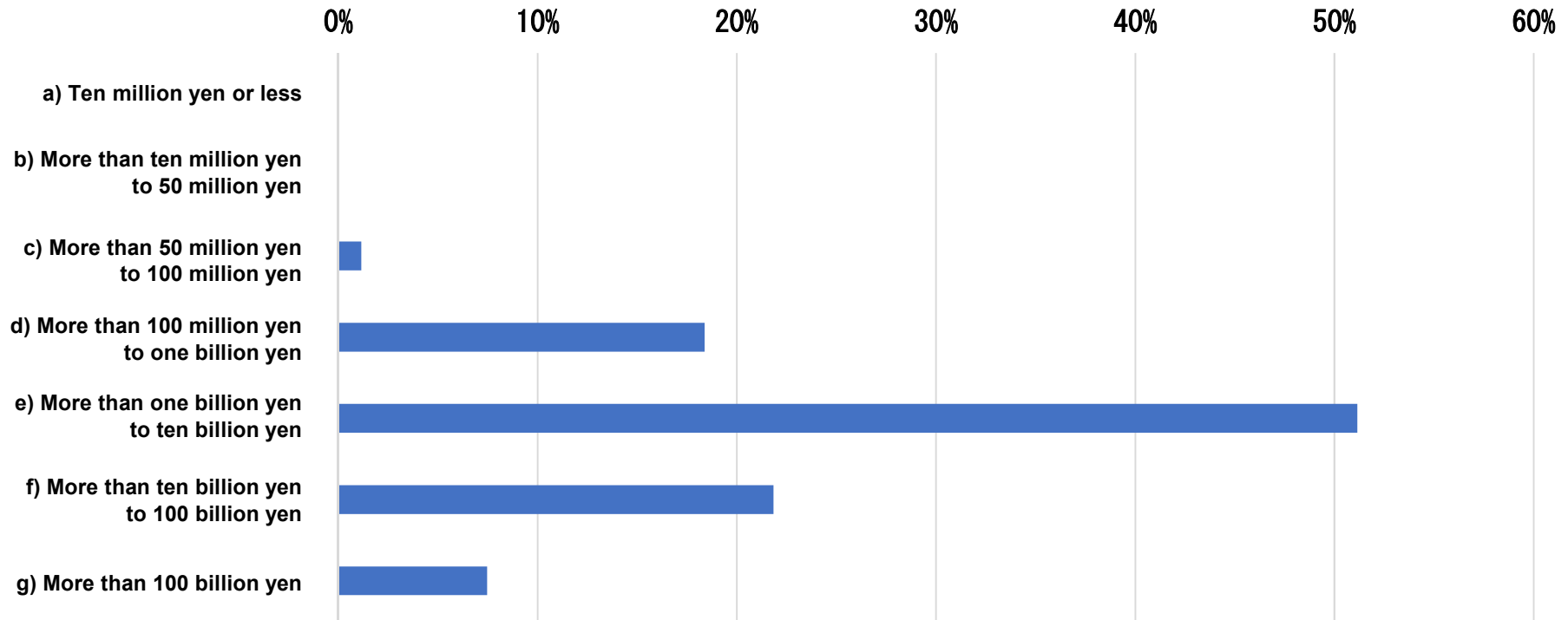
Answers	Number of answers	Ratio (%)
a) Ten or less	2	1.1
b) 11 to 50	34	19.5
c) 51 to 100	36	20.7
d) 101 to 300	57	32.8
e) 301 to 1,000	31	17.8
f) 1,001 or more	14	8.0
Number of respondents	174	100.0

Q2. What is the capital or total amount of investment of your company? [Select one]



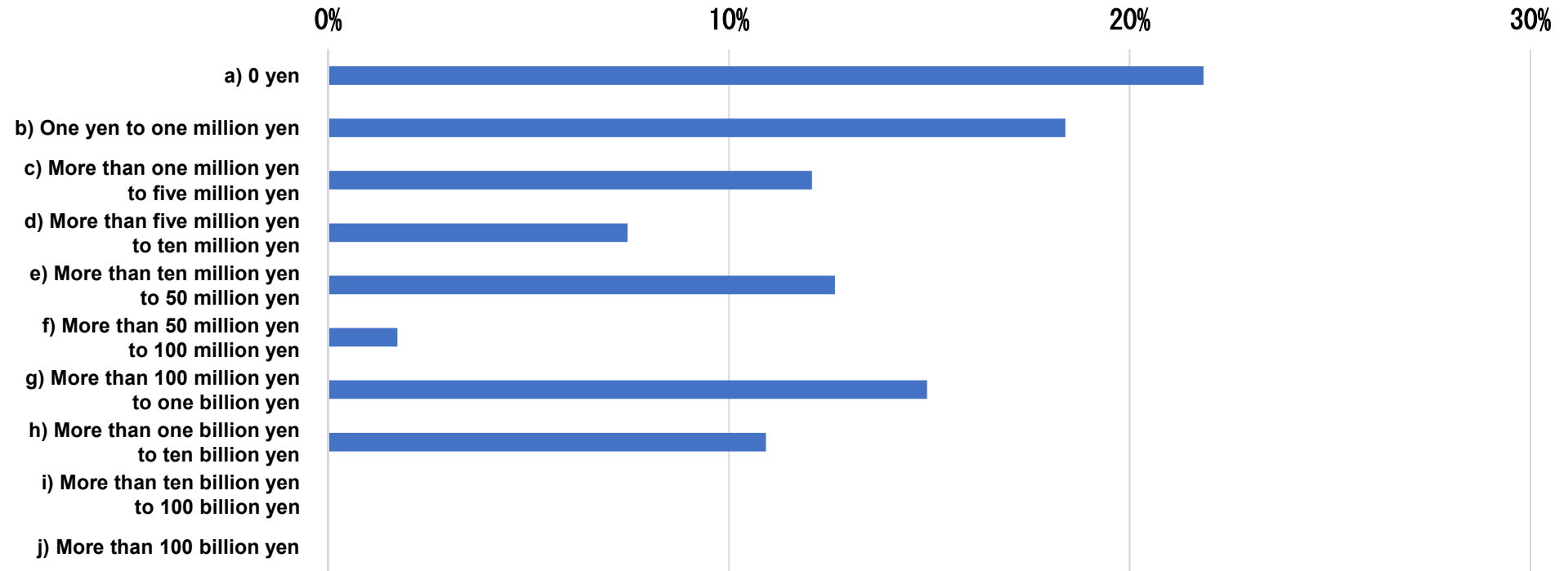
Answers	Number of answers	Ratio (%)
a) 0 yen	2	1.1
b) One yen to ten million yen	6	3.4
c) More than ten million yen to 50 million yen	19	10.9
d) More than 50 million yen to 100 million yen	29	16.7
e) More than 100 million yen to 300 million yen	46	26.4
f) More than 300 million yen	72	41.4
Number of respondents	174	100.0

Q3. What is the amount of total sales in your company? Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable) [Select one]



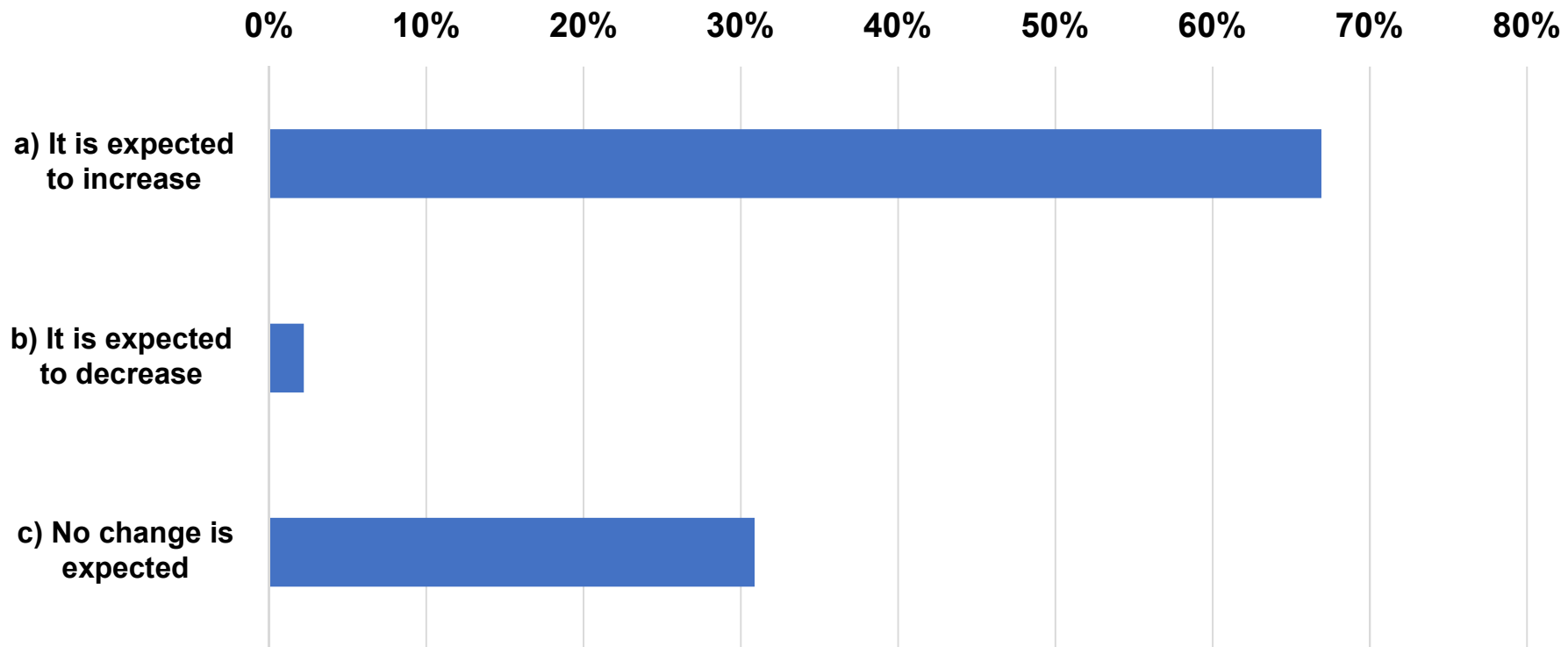
Answers	Number of answers	Ratio (%)
a) Ten million yen or less	-	-
b) More than ten million yen to 50 million yen	-	-
c) More than 50 million yen to 100 million yen	2	1.1
d) More than 100 million yen to one billion yen	32	18.4
e) More than one billion yen to ten billion yen	89	51.1
f) More than ten billion yen to 100 billion yen	38	21.8
g) More than 100 billion yen	13	7.5
Number of respondents	174	100.0

**Q4. What is the amount of total sales for digital advertising business in your company?
Please answer the average amount of three recent fiscal years. (a rough estimate is acceptable) [Select one]**



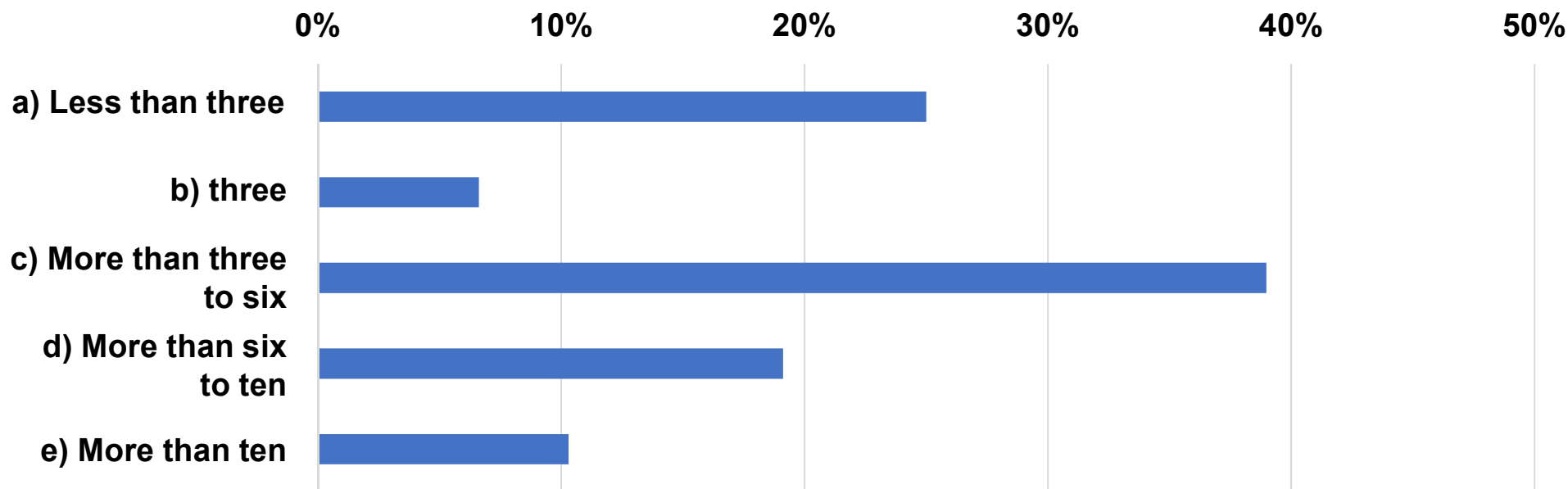
Answers	Number of answers	Ratio(%)
a) 0 yen	38	21.8
b) One yen to one million yen	32	18.4
c) More than one million yen to five million yen	21	12.1
d) More than five million yen to ten million yen	13	7.5
e) More than ten million yen to 50 million yen	22	12.6
f) More than 50 million yen to 100 million yen	3	1.7
g) More than 100 million yen to one billion yen	26	14.9
h) More than one billion yen to ten billion yen	19	10.9
i) More than ten billion yen to 100 billion yen	-	-
j) More than 100 billion yen	-	-
Number of respondents	174	100.0

Q4-1. How do you expect the ratio of digital advertising business sales to transition within the overall advertisement sales at your company in the future? [Select one]



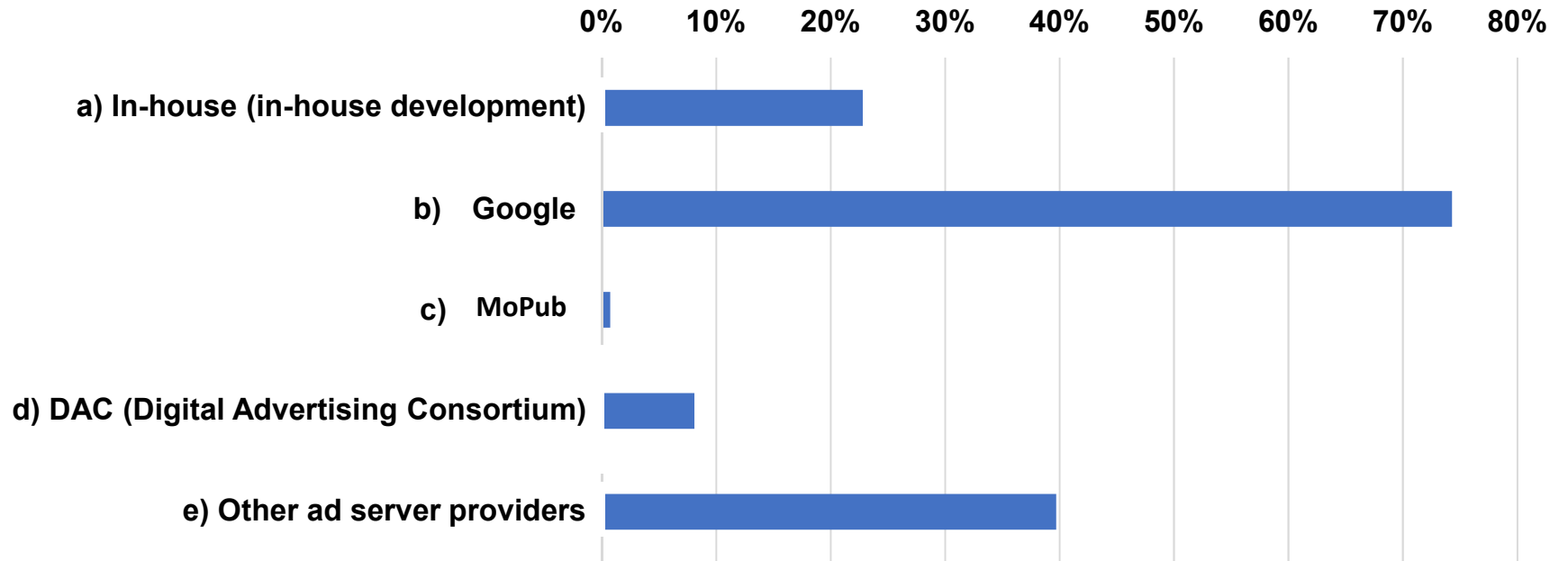
Answers	Number of Answers	Ratio(%)
a) It is expected to increase	91	66.9
b) It is expected to decrease	3	2.2
c) No change is expected	42	30.9
Number of respondents	136	100.0

Q5. How many inventory do you set per a page on websites you operate? (a rough estimate is acceptable) [Select one]



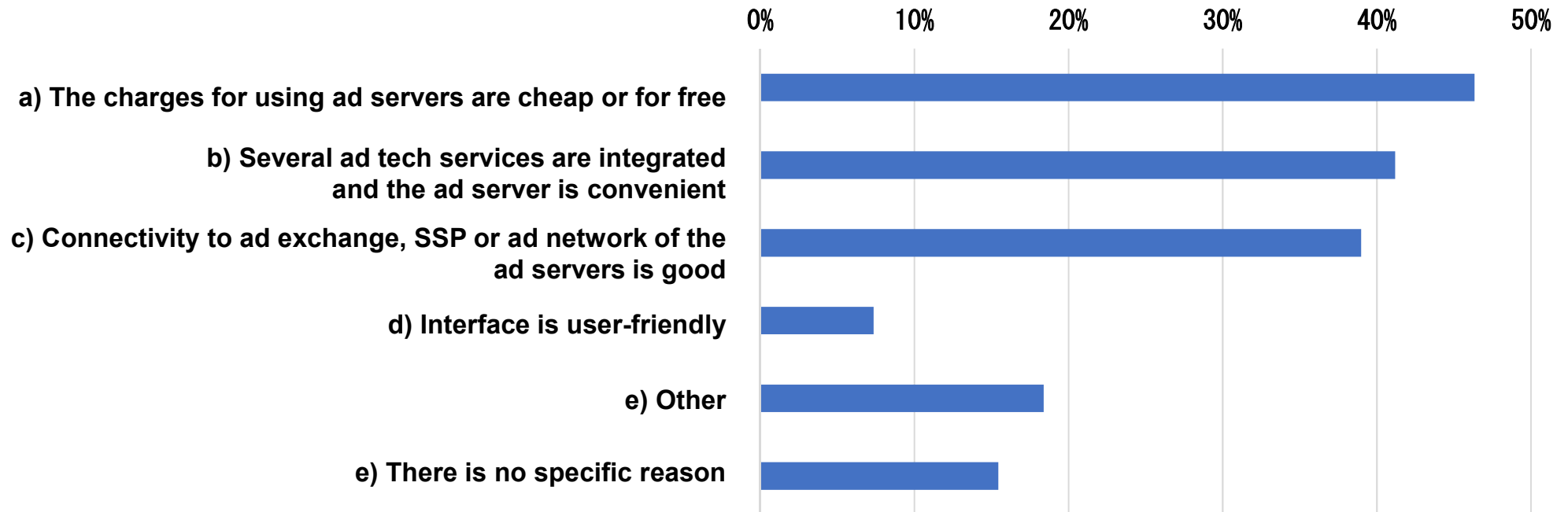
Answers	Number of answers	Ratio (%)
a) Less than three	34	25.0
b) Three	9	6.6
c) More than three to six	53	39.0
d) More than six to ten	26	19.1
e) More than ten	14	10.3
Number of respondents	136	100.0

Q6. When doing digital advertising business on the website you operate, which (media) ad server provider do you use? [Multiple answers accepted]



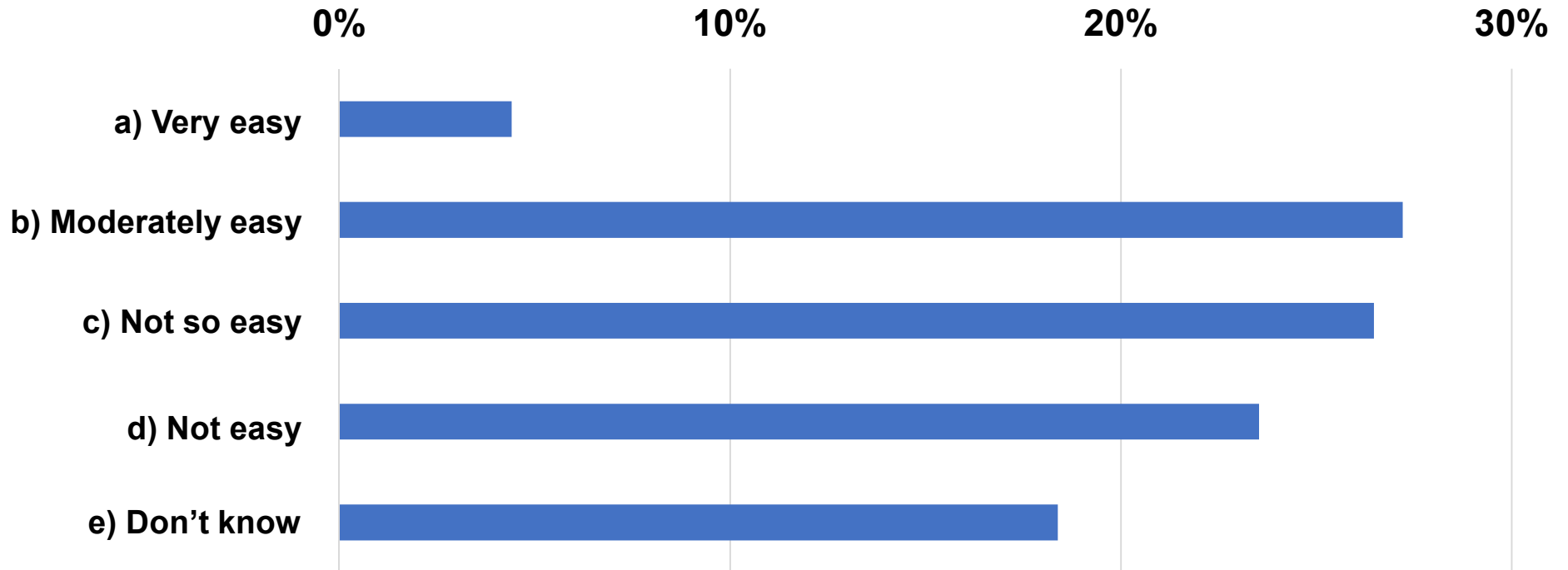
Answers	Number of answers	Ratio (%)
a) In-house (in-house development)	31	22.8
b) Google	101	74.3
c) MoPub	1	0.7
d) DAC (Digital Advertising Consortium)	11	8.1
e) Other ad server providers	54	39.7
Number of respondents	136	-

**Q6-2. What are the reasons do you use the ad server provider you answered at Q6?
Please select from the following. [Multiple answers accepted]**



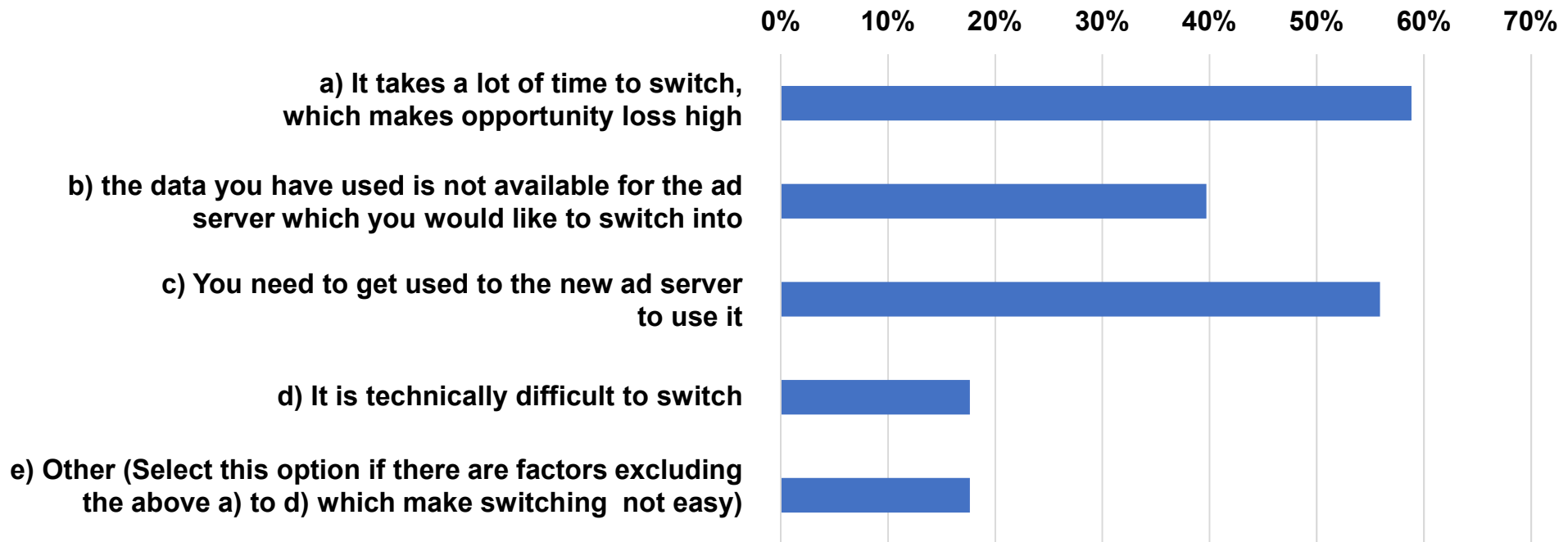
Answers	Number of answers	Ratio (%)
a) The charges for using ad servers are cheap or for free	63	46.3
b) Several ad tech services are integrated and the ad server is convenient	56	41.2
c) Connectivity to ad exchange, SSP or ad network of the ad servers is good	53	39.0
d) Interface is user-friendly	10	7.4
e) Other	25	18.4
f) There is no specific reason	21	15.4
Number of respondents	136	-

Q6-4. How easy is it for you to switch the ad servers you currently use into other ad servers? Please select from the following. [Select one]



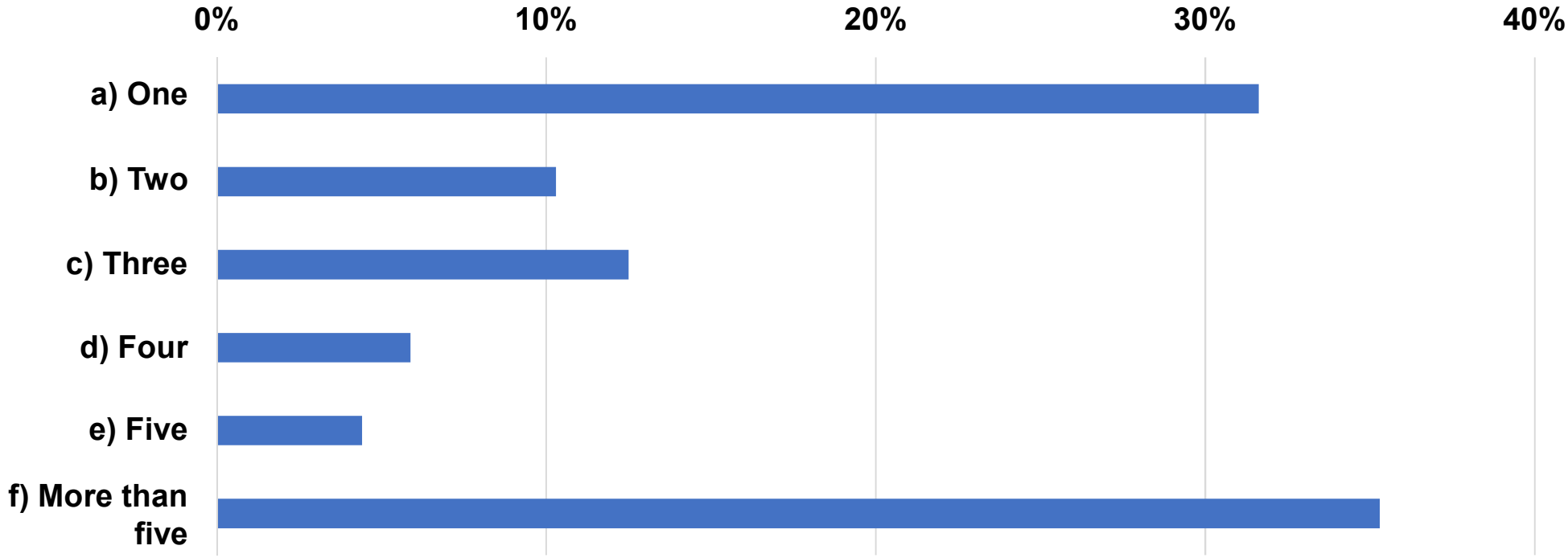
Answers	Number of answers	Ratio (%)
a) Very easy	6	4.4
b) Moderately easy	37	27.2
c) Not so easy	36	26.5
d) Not easy	32	23.5
e) Don't know	25	18.4
Number of respondents	136	100.0

Q6-5. (For those who answered c) or d) at Q6-4) What can be a factor which makes switching of ad servers not easy? Please select from the following. [Multiple answers accepted]



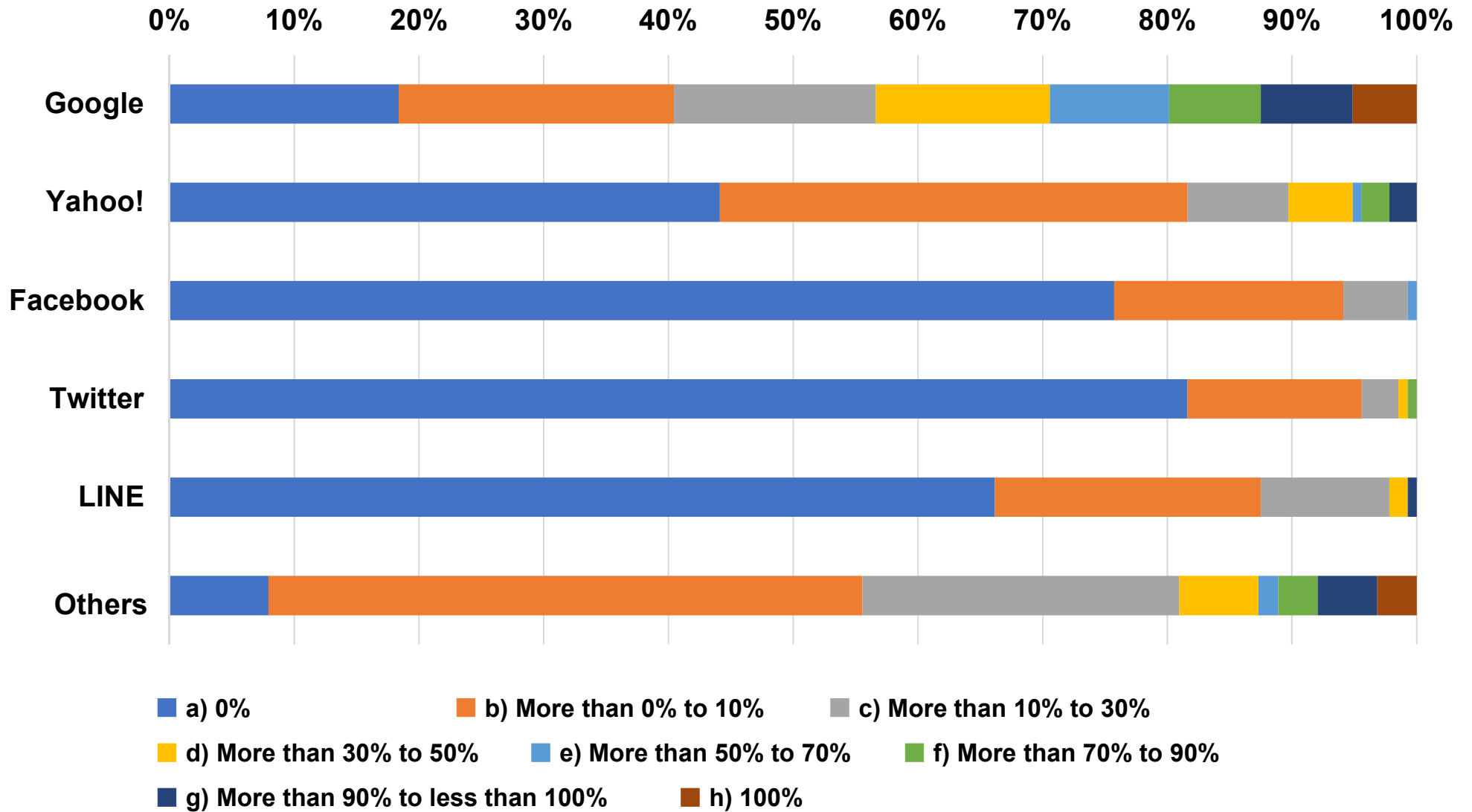
Answers	Number of answers	Ratio (%)
a) It takes a lot of time to switch, which makes opportunity loss high	40	58.8
b) the data you have used is not available for the ad server which you would like to switch into	27	39.7
c) You need to get used to the new ad server to use it	38	55.9
d) It is technically difficult to switch	12	17.6
e) Other (Select this option if there are factors excluding the above a) to d) which make switching not easy)	12	17.6
Number of respondents	68	-

Q7. Select the number of ad tech services products you use in order to do advertising business on the website you operate. [Select one]



Answers	Number of Answers	Ratio (%)
a) One	43	31.6
b) Two	14	10.3
c) Three	17	12.5
d) Four	8	5.9
e) Five	6	4.4
f) More than five	48	35.3
Number of respondents	136	100.0

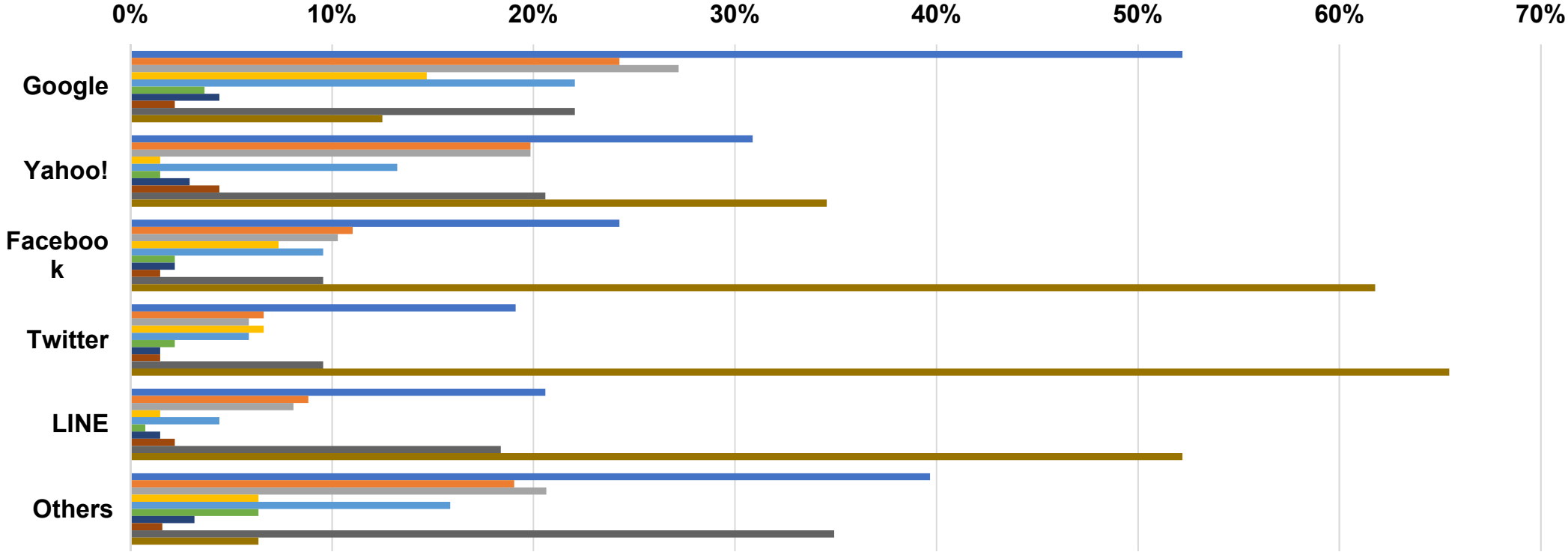
Q7-1. What is the ratio of revenue from transactions with digital platform operators you use in your overall digital advertising business sales? Please answer the average amount of three recent fiscal years per digital platform operator. (a rough estimate is acceptable) [Select one]



Q7-1. What is the ratio of revenue from transactions with digital platform operators you use in your overall digital advertising business sales? Please answer the average amount of three recent fiscal years per digital platform operator. (a rough estimate is acceptable) [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of respondents	Ratio (%)	Number of respondents	Ratio (%)	Number of respondents	Ratio (%)	Number of respondents	Ratio (%)	Number of respondents	Ratio (%)	Number of respondents	Ratio (%)
a) 0%	25	18.4	60	44.1	103	75.7	111	81.6	90	66.2	5	7.9
b) More than 0% to 10%	30	22.1	51	37.5	25	18.4	19	14.0	29	21.3	30	47.6
c) More than 10% to 30%	22	16.2	11	8.1	7	5.1	4	2.9	14	10.3	16	25.4
d) More than 30% to 50%	19	14.0	7	5.1	-	-	1	0.7	2	1.5	4	6.3
e) More than 50% to 70%	13	9.6	1	0.7	1	0.7	-	-	-	-	1	1.6
f) More than 70% to 90%	10	7.4	3	2.2	-	-	1	0.7	-	-	2	3.2
g) More than 90% to less than 100%	10	7.4	3	2.2	-	-	-	-	1	0.7	3	4.8
h) 100%	7	5.1	-	-	-	-	-	-	-	-	2	3.2
Number of respondents	136	100.0	136	100.0	136	100.0	136	100.0	136	100.0	63	100.0

Q8. Do contracts for ad tech services offered by digital platform operators contain stipulations as seen below? [Multiple answers accepted] Please answer this per digital platform operator

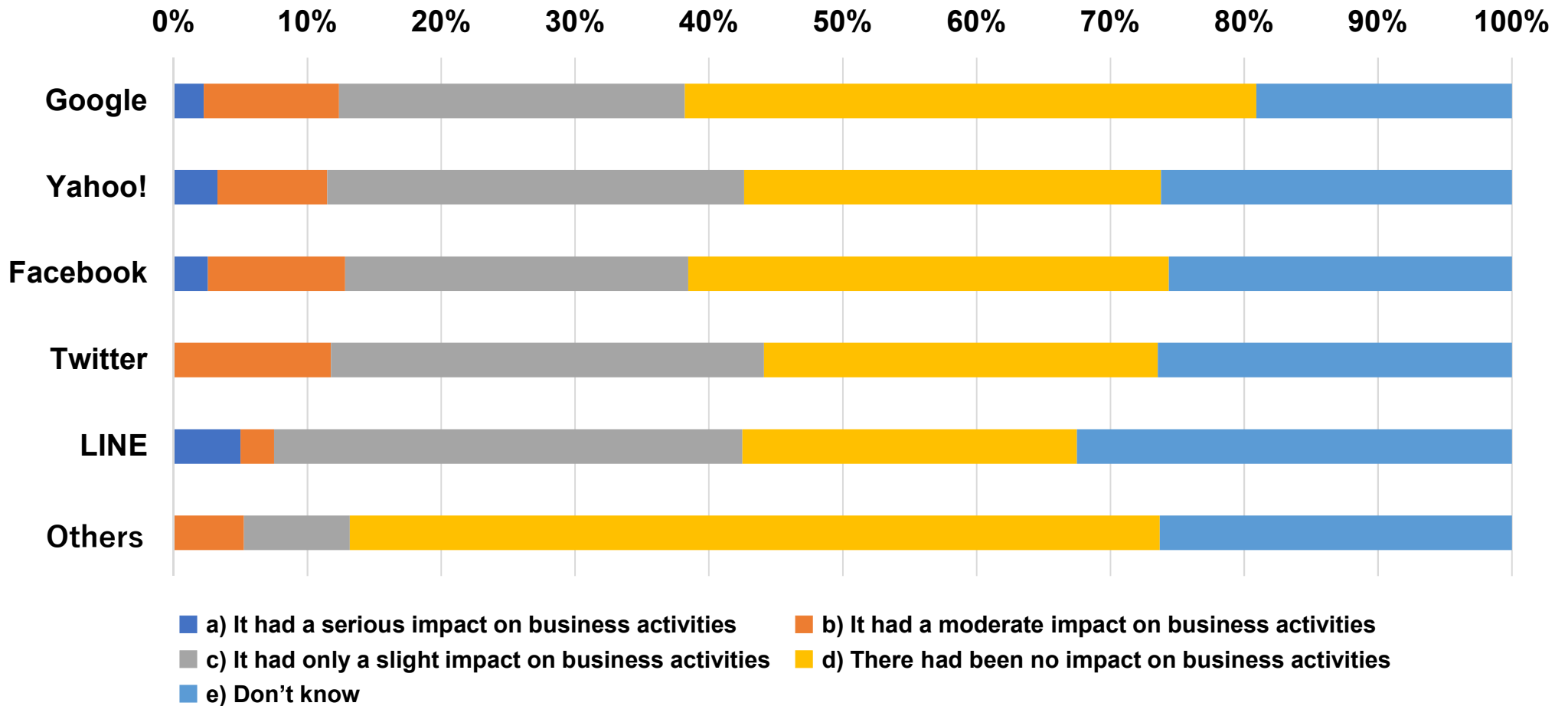


- a) Contracts are uniform and cannot be changed based on negotiation
- b) The said digital platform operators can change contract terms on a discretionary basis
- c) Digital platform operators can stop providing their service on a discretionary basis
- d) Even if the contract is between two domestic businesses, jurisdiction (such as exclusive court jurisdiction) is established overseas
- e) There is no liability or limited liability for any interruption of services (including system failures) of ad tech services offered by the said digital platform operators
- f) Compensation for damage can only be claimed from the said digital platform operators (on a one-way basis)
- g) Only the said digital platform operator can audit your company system (on a one-way basis)
- h) Other (Select this option if there are contract items excluding the above a) to g) which you feel are an issue)
- i) There are no issues or problematic provisions as seen above
- j) We have never dealt with any of the said digital platform operators

Q8. Do contracts for ad tech services offered by digital platform operators contain stipulations as seen below? [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Contracts are uniform and cannot be changed based on negotiation	71	52.2	42	30.9	33	24.3	26	19.1	28	20.6	25	39.7
b) The said digital platform operators can change contract terms on a discretionary basis	33	24.3	27	19.9	15	11.0	9	6.6	12	8.8	12	19.0
c) Digital platform operators can stop providing their service on a discretionary basis	37	27.2	27	19.9	14	10.3	8	5.9	11	8.1	13	20.6
d) Even if the contract is between two domestic businesses, jurisdiction (such as exclusive court jurisdiction) is established overseas	20	14.7	2	1.5	10	7.4	9	6.6	2	1.5	4	6.3
e) There is no liability or limited liability for any interruption of services (including system failures) of ad tech services offered by the said digital platform operators	30	22.1	18	13.2	13	9.6	8	5.9	6	4.4	10	15.9
f) Compensation for damage can only be claimed from the said digital platform operators (on a one-way basis)	5	3.7	2	1.5	3	2.2	3	2.2	1	0.7	4	6.3
g) Only the said digital platform operator can audit your company system (on a one-way basis)	6	4.4	4	2.9	3	2.2	2	1.5	2	1.5	2	3.2
h) Other (Select this option if there are contract items excluding the above a) to g) which you feel are an issue)	3	2.2	6	4.4	2	1.5	2	1.5	3	2.2	1	1.6
i) There are no issues or problematic provisions as seen above	30	22.1	28	20.6	13	9.6	13	9.6	25	18.4	22	34.9
j) We have never dealt with any of the said digital platform operators	17	12.5	47	34.6	84	61.8	89	65.4	71	52.2	4	6.3
Number of respondents	136	-	136	-	136	-	136	-	136	-	63	-

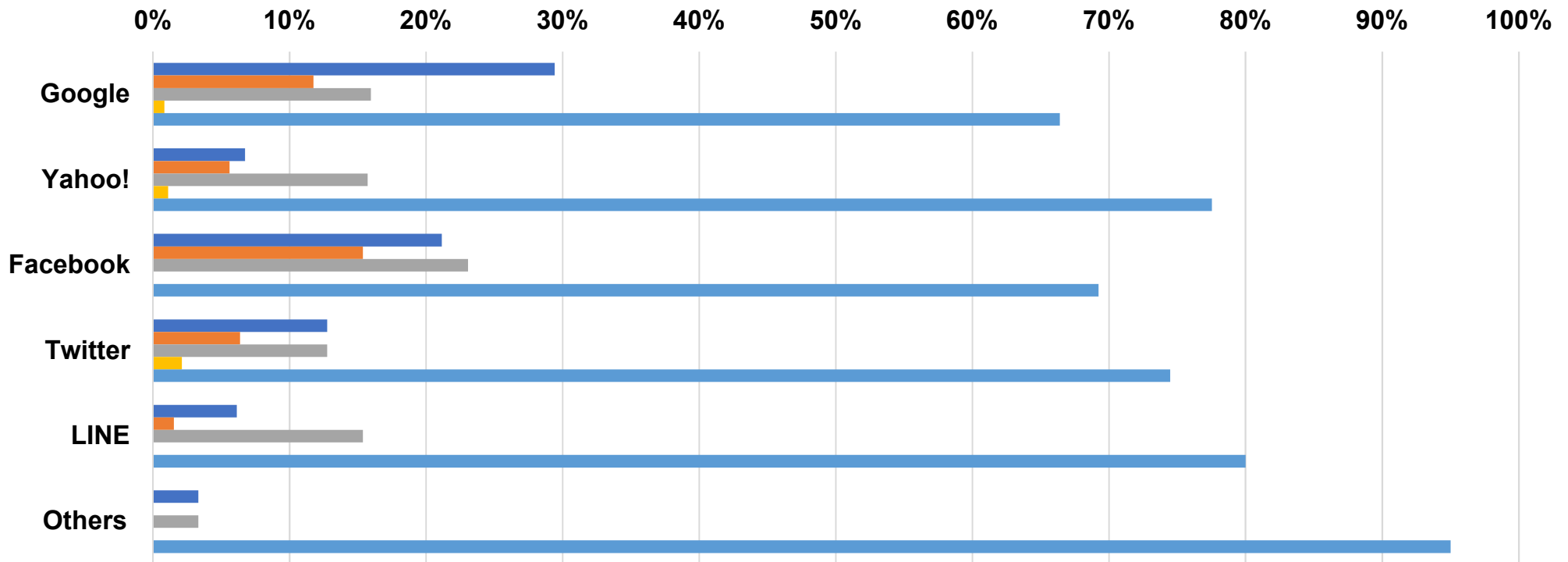
Q8-2. (For those who answered a) to h) at Q8) How does the contract impact your business activities? [Select one]



Q8-2. (For those who answered a) to h) at Q8) How does the contract impact your business activities? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	2	2.2	2	3.3	1	2.6	-	-	2	5.0	-	-
b) It had a moderate impact on business activities	9	10.1	5	8.2	4	10.3	4	11.8	1	2.5	2	5.3
c) It had only a slight impact on business activities	23	25.8	19	31.1	10	25.6	11	32.4	14	35.0	3	7.9
d) There had been no impact on business activities	38	42.7	19	31.1	14	35.9	10	29.4	10	25.0	23	60.5
e) Don't know	17	19.1	16	26.2	10	25.6	9	26.5	13	32.5	10	26.3
Number of respondents	89	100.0	61	100.0	39	100.0	34	100.0	40	100.0	38	100.0

Q9. When using the ad tech services provided by digital platform operators, did you experience any of the following changes with transition to the said ad tech service system? [Multiple answers accepted]

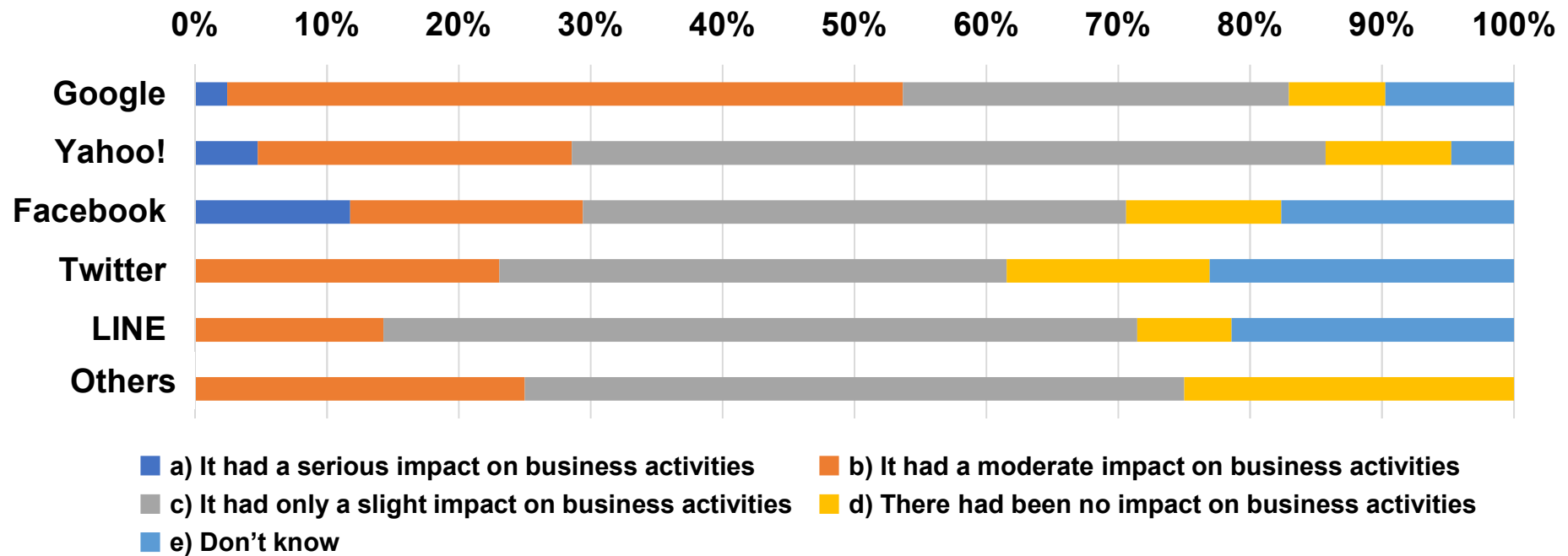


- a) We struggled to correspond to the sudden system change
- b) Reasons for the system change were not clearly stated
- c) Company wishes were not reflected in the system change
- d) Other (Select this option if there are issues in system change excluding the above a) to c))
- e) There are no issues, and no problems as seen above

Q9. When using the ad tech services provided by digital platform operators, did you experience any of the following changes with transition to the said ad tech service system? [Multiple answers accepted]

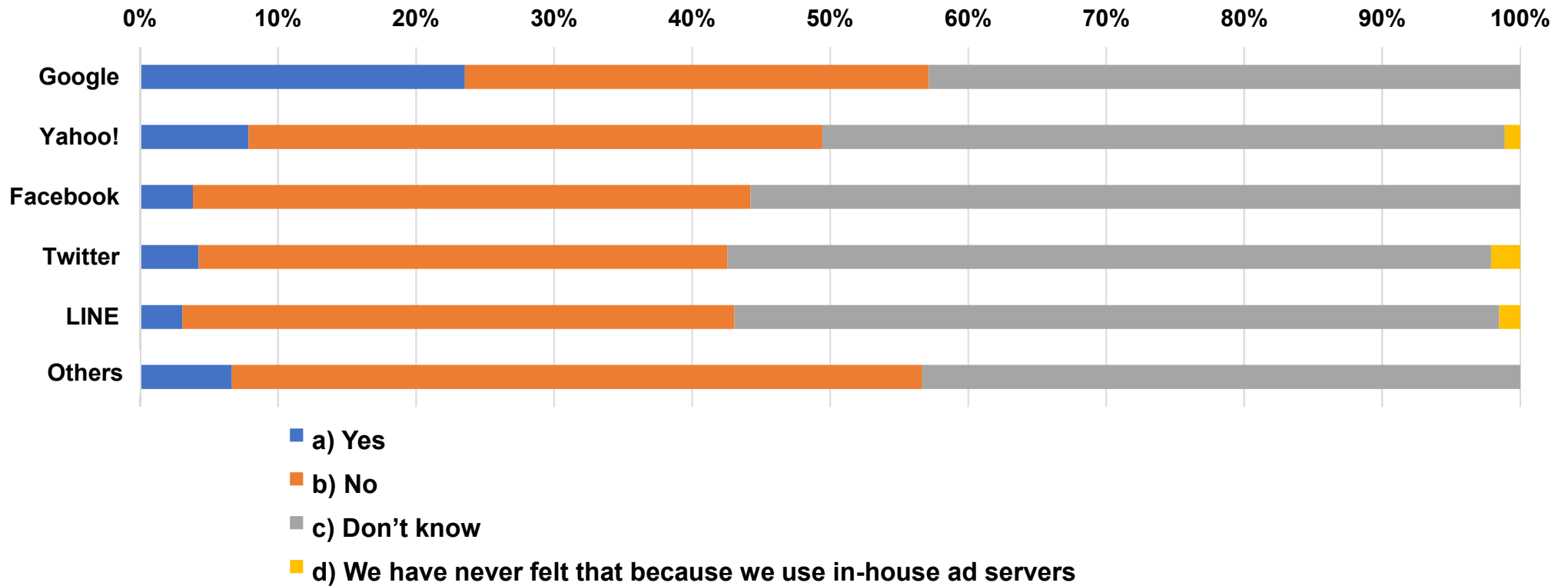
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We struggled to correspond to the sudden system change	35	29.4	6	6.7	11	21.2	6	12.8	4	6.2	2	3.3
b) Reasons for the system change were not clearly stated	14	11.8	5	5.6	8	15.4	3	6.4	1	1.5	-	-
c) Company wishes were not reflected in the system change	19	16.0	14	15.7	12	23.1	6	12.8	10	15.4	2	3.3
d) Other (Select this option if there are issues in system change excluding the above a) to c))	1	0.8	1	1.1	-	-	1	2.1	-	-	-	-
e) There are no issues, and no problems as seen above	79	66.4	69	77.5	36	69.2	35	74.5	52	80.0	57	95.0
Number of respondents	119	-	89	-	52	-	47	-	65	-	60	-

**Q9-2. (For those who answered a) to d) at Q9) How does that impact your business activities?
[Select one]**



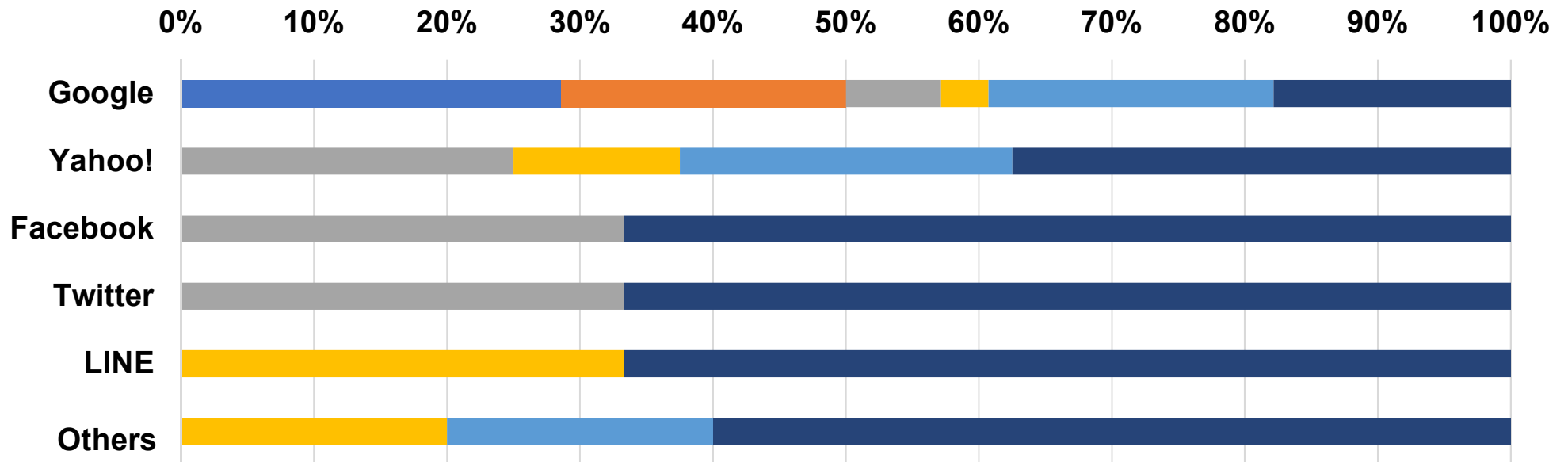
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	1	2.4	1	4.8	2	11.8	-	-	-	-	-	-
b) It had a moderate impact on business activities	21	51.2	5	23.8	3	17.6	3	23.1	2	14.3	1	25.0
c) It had only a slight impact on business activities	12	29.3	12	57.1	7	41.2	5	38.5	8	57.1	2	50.0
d) There had been no impact on business activities	3	7.3	2	9.5	2	11.8	2	15.4	1	7.1	1	25.0
e) Don't know	4	9.8	1	4.8	3	17.6	3	23.1	3	21.4	-	-
Number of respondents	41	100.0	21	100.0	17	100.0	13	100.0	14	100.0	4	100.0

Q10. When (publisher) ad servers you use request distribution of advertisements to ad tech services, have you felt that the ad servers preferentially request distribution to a specific digital platform operator which provides ad tech services? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	28	23.5	7	7.9	2	3.8	2	4.3	2	3.1	4	6.7
b) No	40	33.6	37	41.6	21	40.4	18	38.3	26	40.0	30	50.0
c) Don't know	51	42.9	44	49.4	29	55.8	26	55.3	36	55.4	26	43.3
d) We have never felt that because we use in-house ad servers	-	-	1	1.1	-	-	1	2.1	1	1.5	-	-
Number of respondents	119	100.0	89	100.0	52	100.0	47	100.0	65	100.0	60	100.0

Q10-1. (For those who answered “a) Yes” at Q10) Can you change the settings that ad servers request distribution preferentially? Have you ever changed them indeed? [Select one]

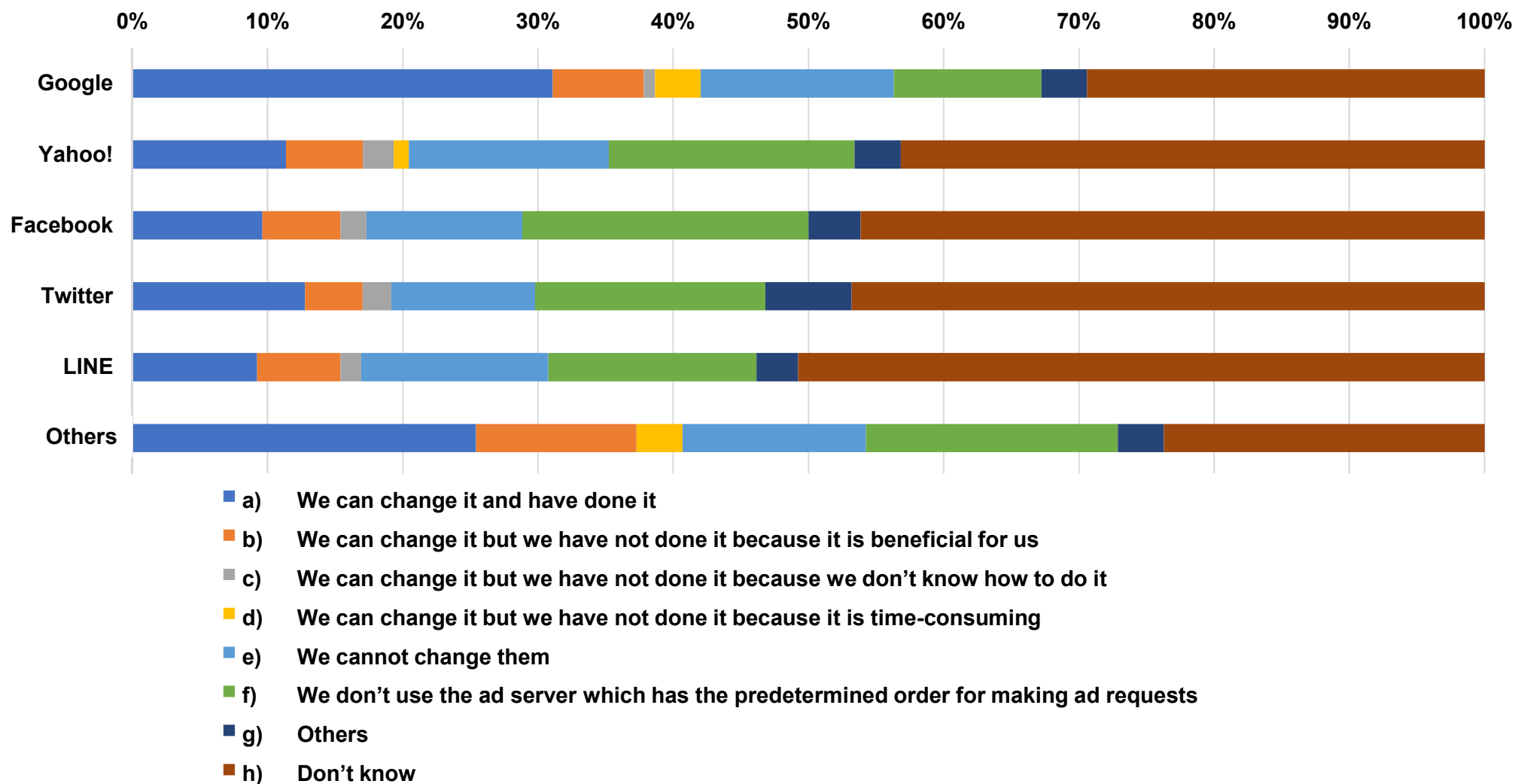


- a) We can change them and have done it
- b) We can change them but we have not done it because it is beneficial for us
- c) We can change them but we have not done it because we don't know how to do it
- d) We can change them but we have not done it because it is time-consuming
- e) We cannot change them
- f) Others
- g) Don't know

Q10-1. (For those who answered “a) Yes” at Q10) Can you change the settings that ad servers request distribution preferentially? Have you ever changed them indeed? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We can change them and have done it	8	28.6	-	-	-	-	-	-	-	-	-	-
b) We can change them but we have not done it because it is beneficial for us	6	21.4	-	-	-	-	-	-	-	-	-	-
c) We can change them but we have not done it because we don't know how to do it	2	7.1	2	25.0	1	33.3	1	33.3	-	-	-	-
d) We can change them but we have not done it because it is time-consuming	1	3.6	1	12.5	-	-	-	-	1	33.3	1	20.0
e) We cannot change them	6	21.4	2	25.0	-	-	-	-	-	-	1	20.0
f) Others	-	-	-	-	-	-	-	-	-	-	-	-
g) Don't know	5	17.9	3	37.5	2	66.7	2	66.7	2	66.7	3	60.0
Number od respondents	28	100.0	8	100.0	3	100.0	3	100.0	3	100.0	5	100.0

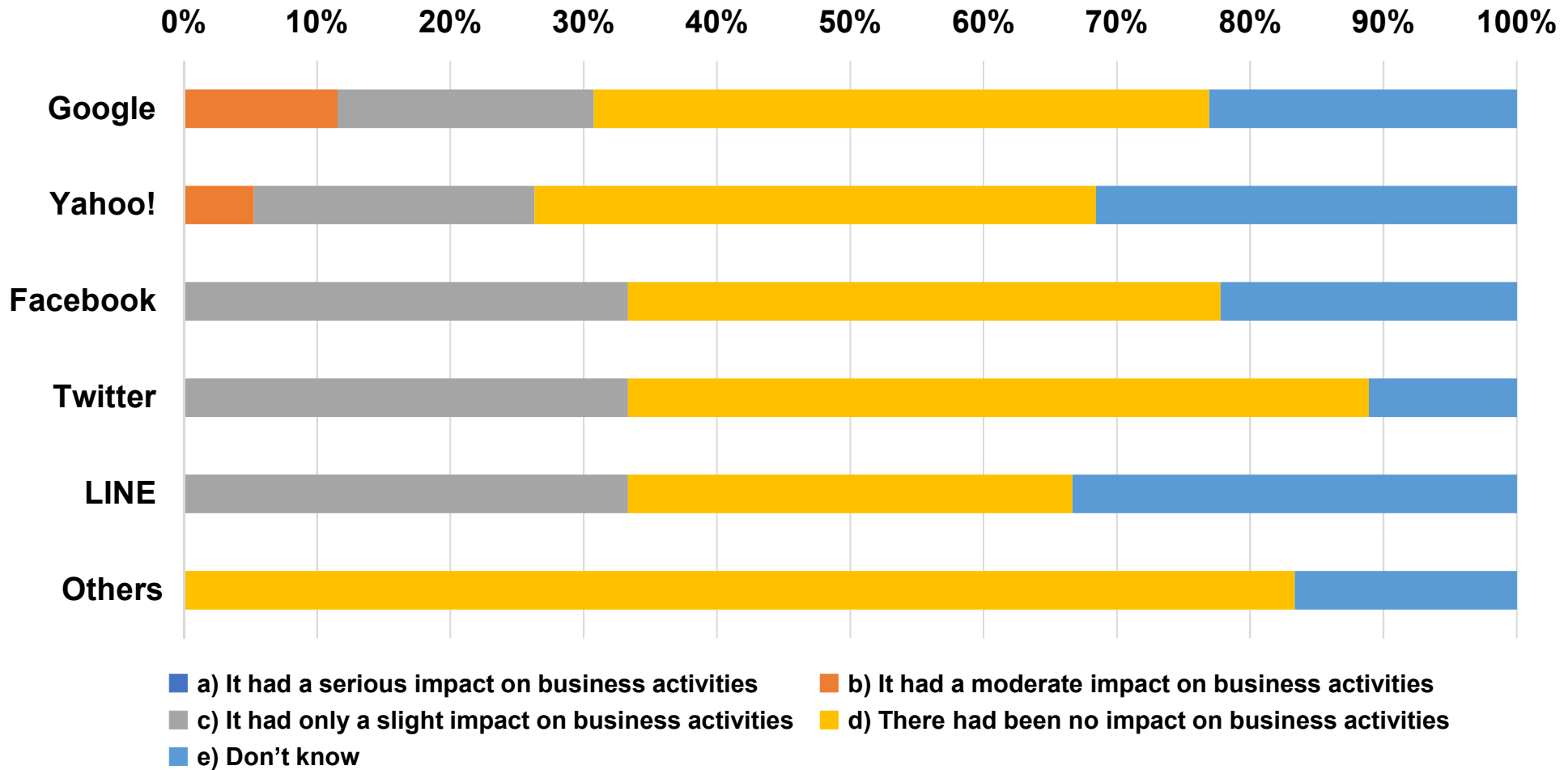
Q11. When the ad server you use has a predetermined order for making ad requests within the ad server (e.g. pure ads, private marketplaces, ad exchanges, ad networks are requested in that order), can you change the order in-house (including system or contract reasons)? Have you ever changed it indeed? [Select one]



Q11. When the ad server you use has a predetermined order for making ad requests within the ad server (e.g. pure ads, private marketplaces, ad exchanges, ad networks are requested in that order), can you change the order in-house (including system or contract reasons)? Have you ever changed it indeed? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of Answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We can change it and have done it	37	31.1	10	11.4	5	9.6	6	12.8	6	9.2	15	25.4
b) We can change it but we have not done it because it is beneficial for us	8	6.7	5	5.7	3	5.8	2	4.3	4	6.2	7	11.9
c) We can change it but we have not done it because we don't know how to do it	1	0.8	2	2.3	1	1.9	1	2.1	1	1.5	-	-
d) We can change it but we have not done it because it is time-consuming	4	3.4	1	1.1	-	-	-	-	-	-	2	3.4
e) We cannot change it	17	14.3	13	14.8	6	11.5	5	10.6	9	13.8	8	13.6
f) We don't use the ad server which has the predetermined order for making ad requests	13	10.9	16	18.2	11	21.2	8	17.0	10	15.4	11	18.6
g) Others	4	3.4	3	3.4	2	3.8	3	6.4	2	3.1	2	3.4
h) Don't know	35	29.4	38	43.2	24	46.2	22	46.8	33	50.8	14	23.7
Number of respondents	119	100.0	88	100.0	52	100.0	47	100.0	65	100.0	59	100.0

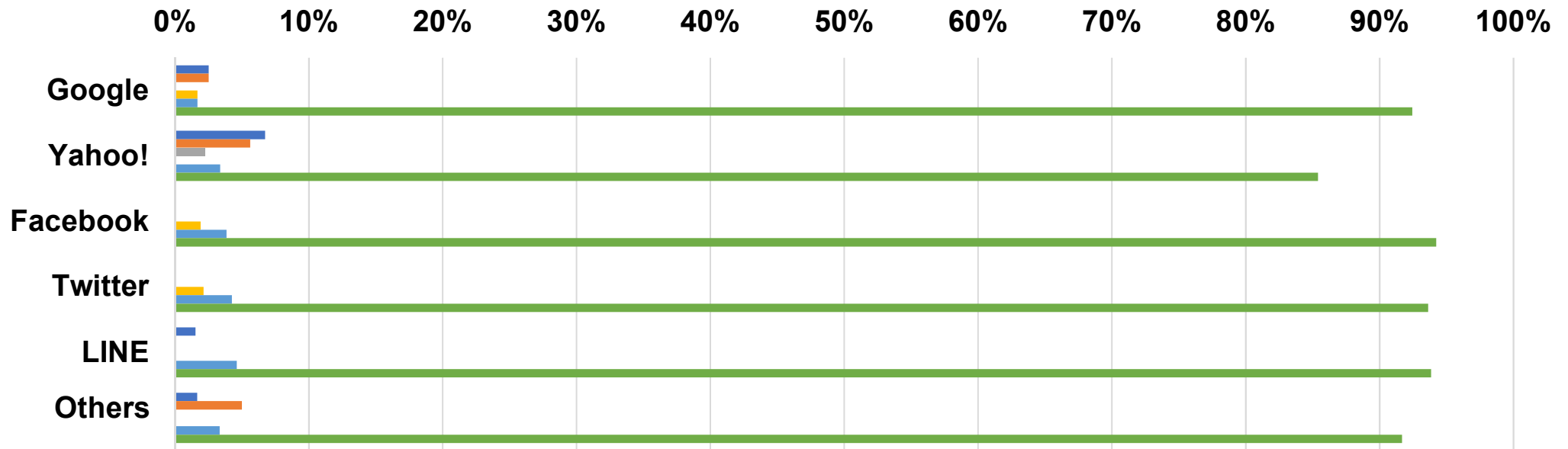
Q11-2. (For those who answered c), d), e), or g) at Q11) When there is a predetermined order for making ad requests within the ad server and the ad requests are done in that order, how does it impact your business activities ? [Select one]



Q11-2. (For those who answered c), d), e),or g) at Q11) When there is a predetermined order for making ad requests within the ad server and the ad requests are done in that order, how does it impact your business activities ? [Select one]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b)) It had a moderate impact on business activities	3	11.5	1	5.3	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	5	19.2	4	21.1	3	33.3	3	33.3	4	33.3	-	-
d) There had been no impact on business activities	12	46.2	8	42.1	4	44.4	5	55.6	4	33.3	10	83.3
e) Don't know	6	23.1	6	31.6	2	22.2	1	11.1	4	33.3	2	16.7
Number of respondents	26	100.0	19	100.0	9	100.0	9	100.0	12	100.0	12	100.0

Q12. When using the ad tech services provided by digital platform operators, did you experience any of the following? [Multiple answers accepted]

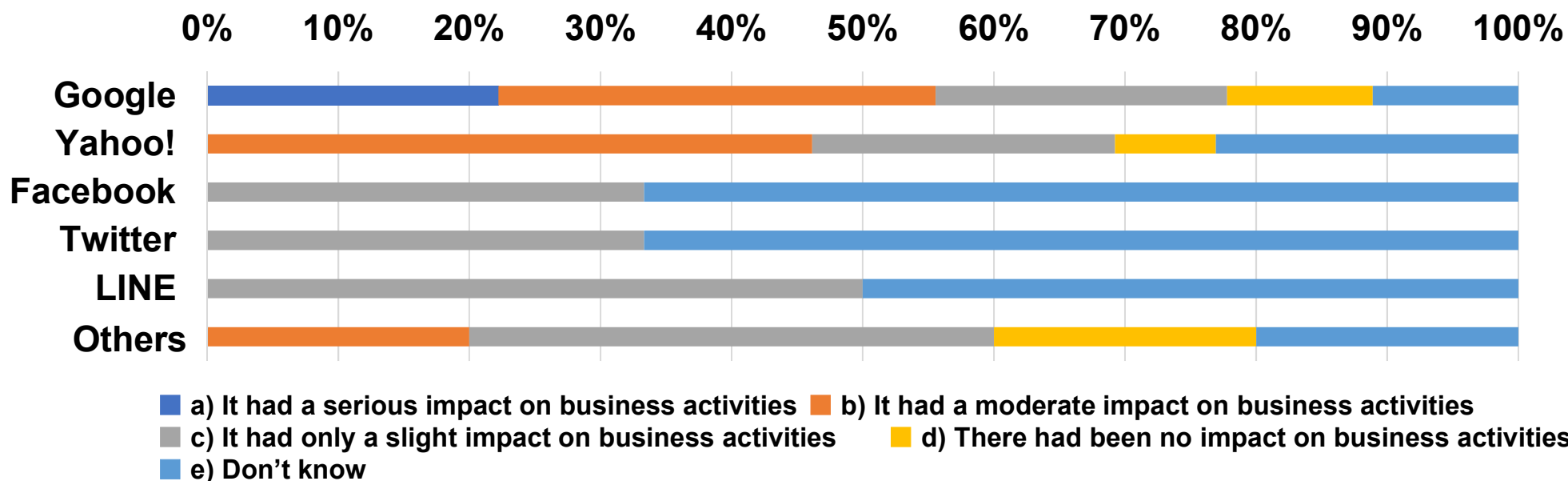


- a) Digital platform operators prohibited use of other third-party services
- b) Staff from the digital platform operators told us not to use third-party services (Explicitly or implicitly)
- c) Consultation to digital platform operators was necessary when using a third-party service that is not an ad tech service provided by them.
- d) There was no clear explanation on why an account was suspended
- e) Other (Select this option if there were issues in using third-party services excluding the above a) to d))
- f) There were no issues, and no problems as seen above

Q12. When using the ad tech services provided by digital platform operators, did you experience any of the following? [Multiple answers accepted]

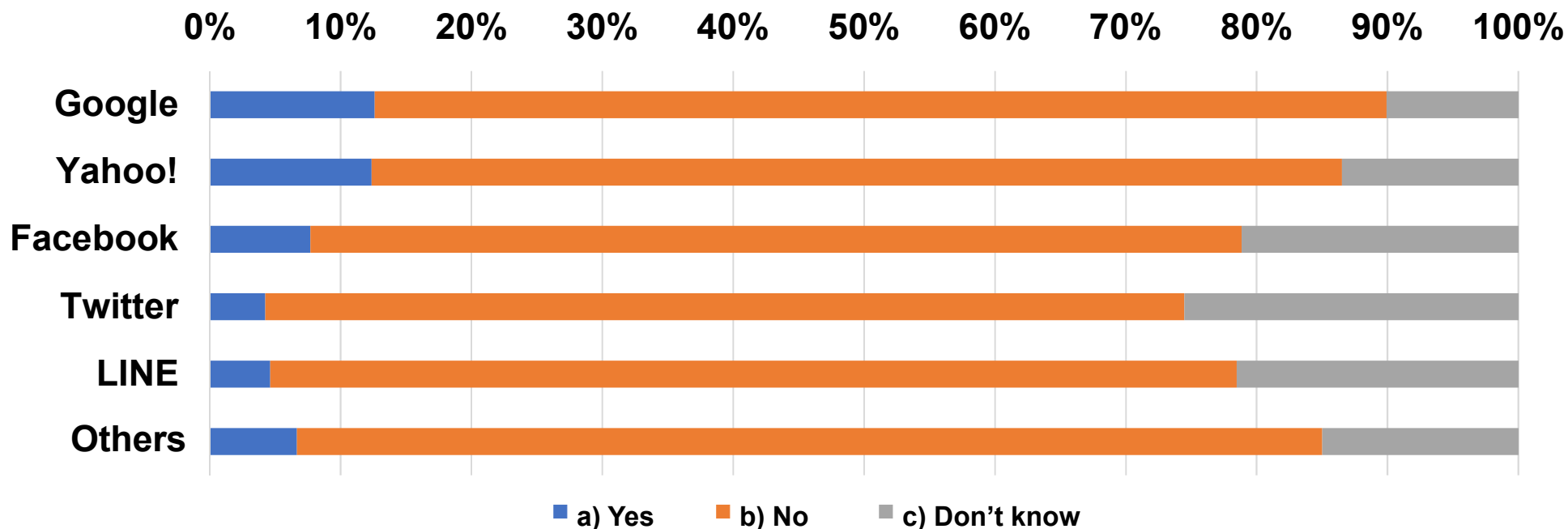
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Digital platform operators prohibited use of other third-party services	3	2.5	6	6.7	-	-	-	-	1	1.5	1	1.7
b) Staff from the digital platform operators told us not to use third-party services (Explicitly or implicitly)	3	2.5	5	5.6	-	-	-	-	-	-	3	5.0
c) Consultation to digital platform operators was necessary when using a third-party service that is not an ad tech service provided by them.	-	-	2	2.2	-	-	-	-	-	-	-	-
d) There was no clear explanation on why an account was suspended	2	1.7	-	-	1	1.9	1	2.1	-	-	-	-
e) Other (Select this option if there were issues in using third-party services excluding the above a) to d))	2	1.7	3	3.4	2	3.8	2	4.3	3	4.6	2	3.3
f) There were no issues, and no problems as seen above	110	92.4	76	85.4	49	94.2	44	93.6	61	93.8	55	91.7
Number of respondents	119	-	89	-	52	-	47	-	65	-	60	-

Q12-2. (For those who answered a) to e) at Q12) How did this impact your business activities? [Select one]



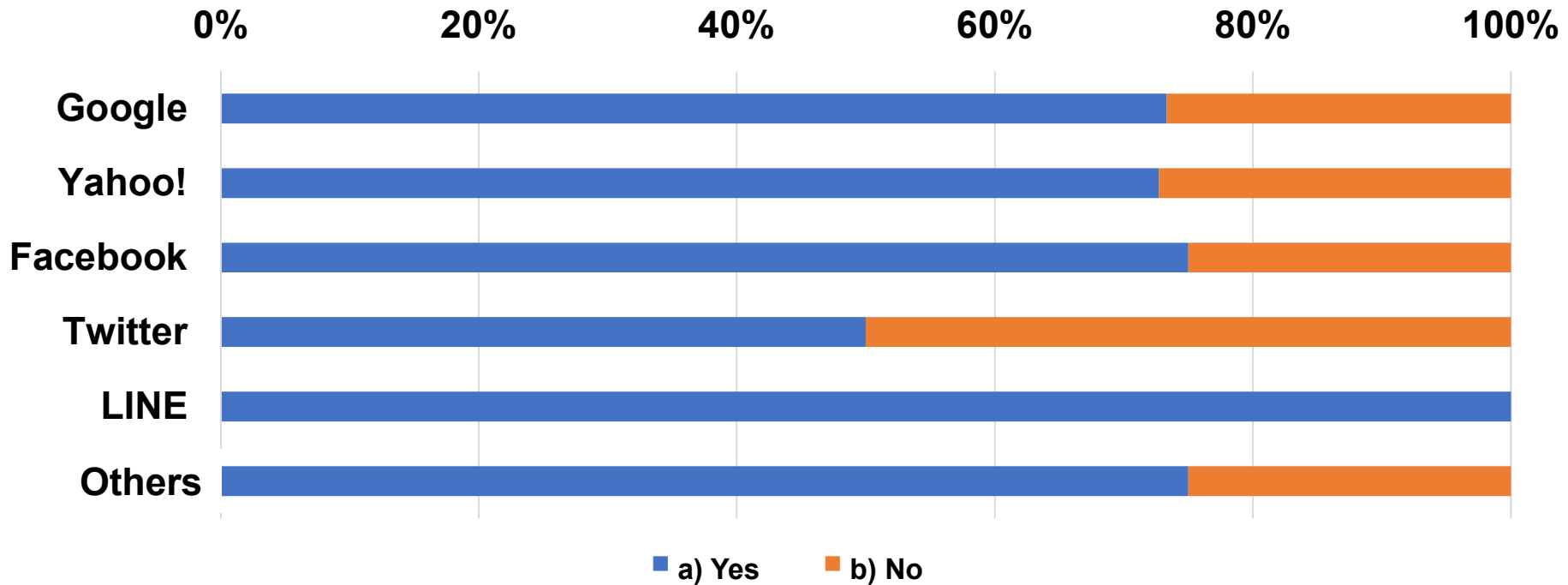
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	2	22.2	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	3	33.3	6	46.2	-	-	-	-	-	-	1	20.0
c) It had only a slight impact on business activities	2	22.2	3	23.1	1	33.3	1	33.3	2	50.0	2	40.0
d) There had been no impact on business activities	1	11.1	1	7.7	-	-	-	-	-	-	1	20.0
e) Don't know	1	11.1	3	23.1	2	66.7	2	66.7	2	50.0	1	20.0
Number of respondents	9	100.0	13	100.0	3	100.0	3	100.0	4	100.0	5	100.0

Q13. When you provide (sell) inventories to the ad tech services provided by digital platform operators, have you ever been requested to provide the most profitable inventory in the inventories you have by the said digital platform operators? [Select one]



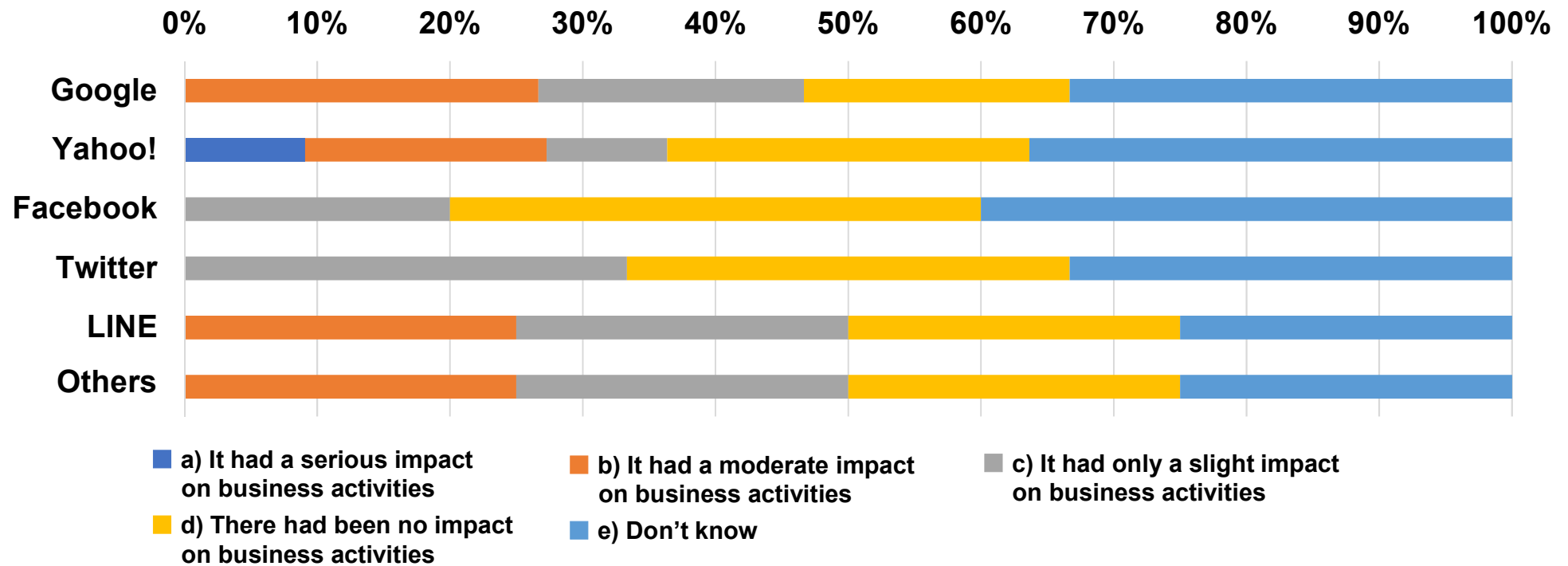
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	15	12.6	11	12.4	4	7.7	2	4.3	3	4.6	4	6.7
b) No	92	77.3	66	74.2	37	71.2	33	70.2	48	73.8	47	78.3
c) Don't know	12	10.1	12	13.5	11	21.2	12	25.5	14	21.5	9	15.0
Number of respondents	119	100.0	89	100.0	52	100.0	47	100.0	65	100.0	60	100.0

Q13-1. (For those who answered “a) Yes” at Q13) did you accept it? [Select one]



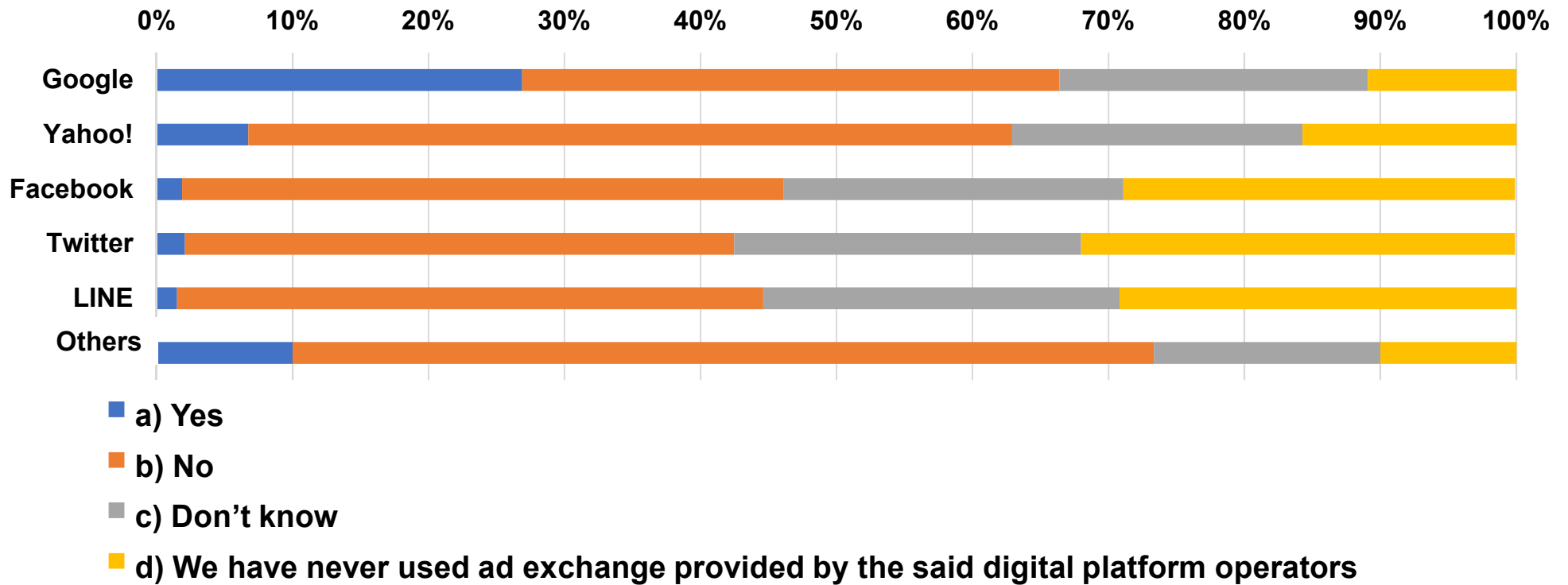
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	11	73.3	8	72.7	3	75.0	1	50.0	3	100.0	3	75.0
b) No	4	26.7	3	27.3	1	25.0	1	50.0	-	-	1	25.0
Number of respondents	15	100.0	11	100.0	4	100.0	2	100.0	3	100.0	4	100.0

Q13-2. (For those who answered “a) Yes” at Q13) How does the contract impact your business activities? [Select one]



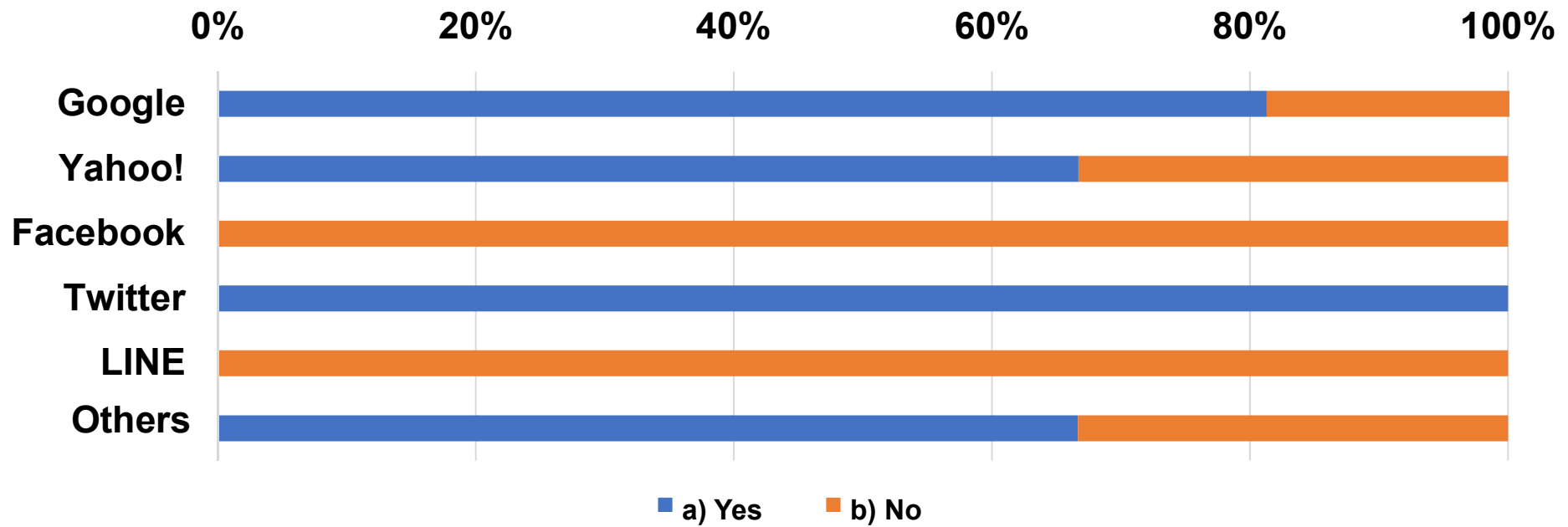
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	1	9.1	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	4	26.7	2	18.2	-	-	-	-	1	25.0	1	25.0
c) It had only a slight impact on business activities	3	20.0	1	9.1	1	20.0	1	33.3	1	25.0	1	25.0
d) There had been no impact on business activities	3	20.0	3	27.3	2	40.0	1	33.3	1	25.0	1	25.0
e) Don't know	5	33.3	4	36.4	2	40.0	1	33.3	1	25.0	1	25.0
Number of respondents	15	100.0	11	100.0	5	100.0	3	100.0	4	100.0	4	100.0

Q14. When using the ad tech services provided by digital platform operators to distribute advertisements, was there a case in which they suggested you to control the floor price? [Select one]



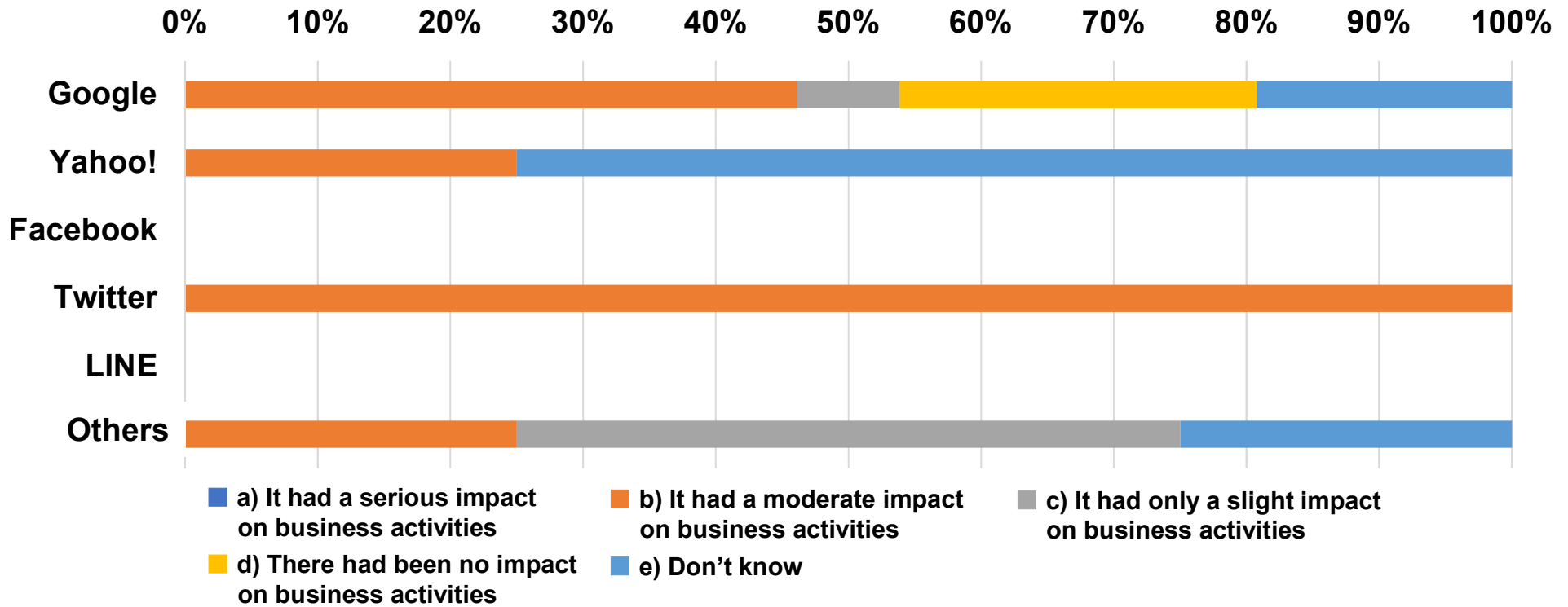
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	32	26.9	6	6.7	1	1.9	1	2.1	1	1.5	6	10.0
b) No	47	39.5	50	56.2	23	44.2	19	40.4	28	43.1	38	63.3
c) Don't know	27	22.7	19	21.3	13	25.0	12	25.5	17	26.2	10	16.7
d) We have never used ad exchange provided by the said digital platform operators	13	10.9	14	15.7	15	28.8	15	31.9	19	29.2	6	10.0
Number of respondents	119	100.0	89	100.0	52	100.0	47	100.0	65	100.0	60	100.0

Q14-1. (For those who answered “a) Yes” at Q14) Did you accept it? [Select one]



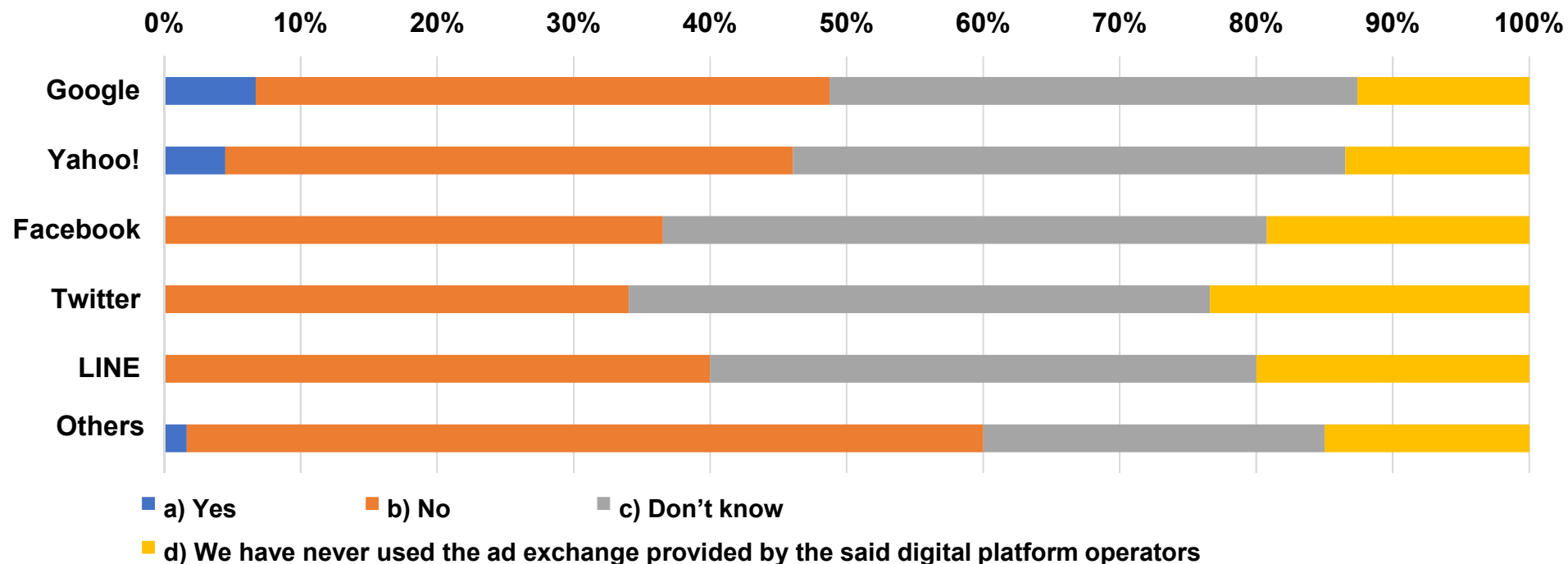
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	26	81.3	4	66.7	-	-	1	100.0	-	-	4	66.7
b) No	6	18.8	2	33.3	1	100.0	-	-	1	100.0	2	33.3
Number of respondents	32	100.0	6	100.0	1	100.0	1	100.0	1	100.0	6	100.0

Q14-1-2. (For those who answered a) at Q14-1) How does accepting floor price control impact your business activities? [Select one]



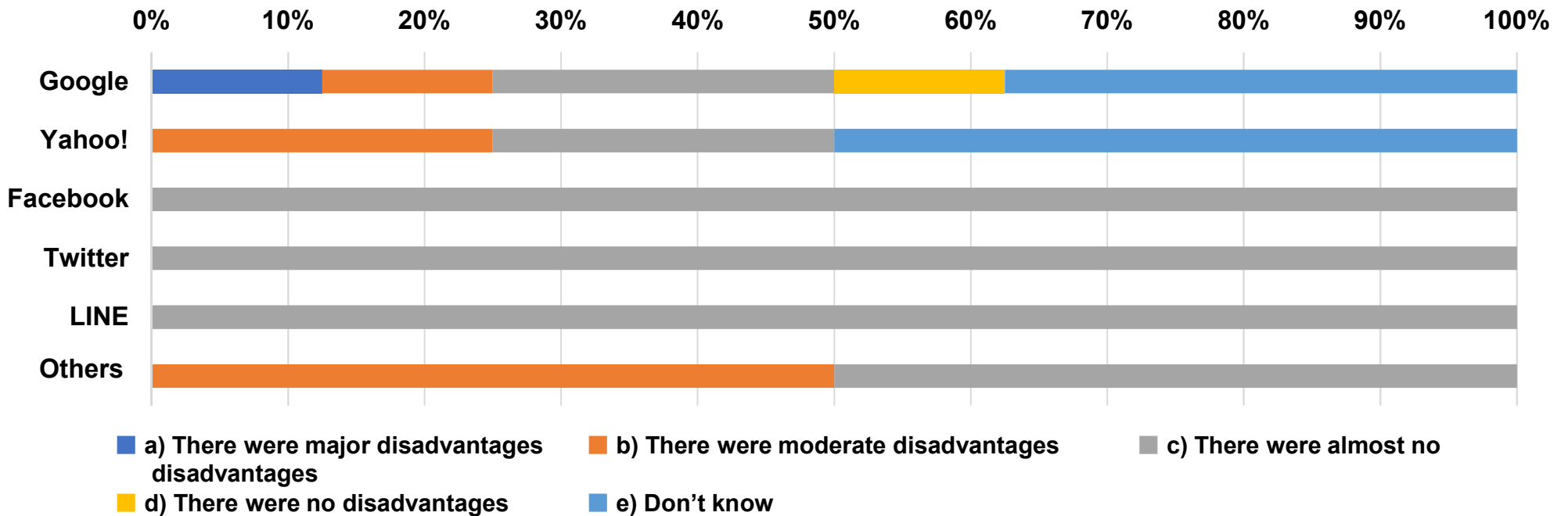
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	12	46.2	1	25.0	-	-	1	100.0	-	-	1	25.0
c) It had only a slight impact on business activities	2	7.7	-	-	-	-	-	-	-	-	2	50.0
d) There had been no impact on business activities	7	26.9	-	-	-	-	-	-	-	-	-	-
e) Don't know	5	19.2	3	75.0	-	-	-	-	-	-	1	25.0
Number of respondents	26	100.0	4	100.0	-	-	1	100.0	-	-	4	100.0

Q15. When an inventory auction is conducted in ad exchanges provided by digital platform operators, have you felt that the said digital platform operators have a grasp on bidding price of other bidders beforehand and use this information in these auctions? [Select one]



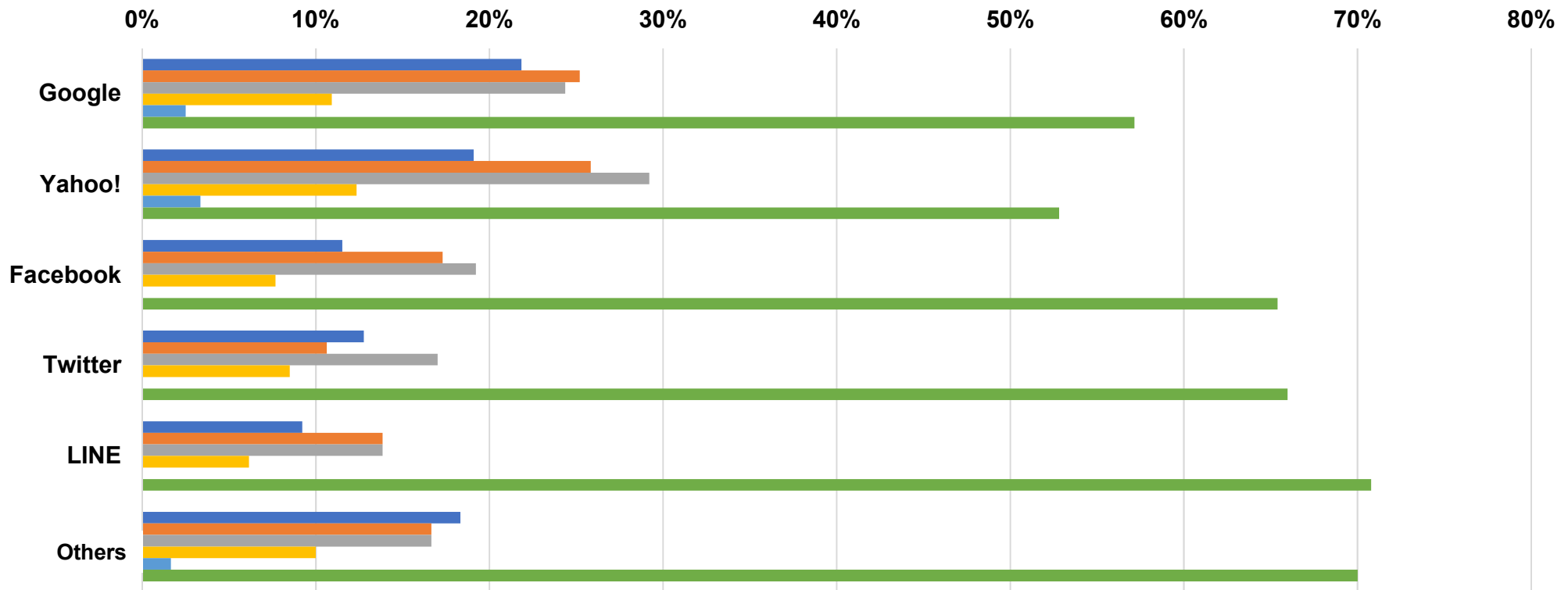
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	8	6.7	4	4.5	-	-	-	-	-	-	1	1.7
b) No	50	42.0	37	41.6	19	36.5	16	34.0	26	40.0	35	58.3
c) Don't know	46	38.7	36	40.4	23	44.2	20	42.6	26	40.0	15	25.0
d) We have never the used ad exchange provided by the said digital platform operators	15	12.6	12	13.5	10	19.2	11	23.4	13	20.0	9	15.0
Number of respondents	119	100.0	89	100.0	52	100.0	47	100.0	65	100.0	60	100.0

Q15-2. (For those who answered “a) Yes” at Q15) Did your company suffer disadvantages due to this activity? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	1	12.5	-	-	-	-	-	-	-	-	-	-
b) There were moderate disadvantages	1	12.5	1	25.0	-	-	-	-	-	-	1	50.0
c) There were almost no disadvantages	2	25.0	1	25.0	1	100.0	1	100.0	1	100.0	1	50.0
d) There were no disadvantages	1	12.5	-	-	-	-	-	-	-	-	-	-
e) Don't know	3	37.5	2	50.0	-	-	-	-	-	-	-	-
Number of respondents	8	100.0	4	100.0	1	100.0	1	100.0	1	100.0	2	100.0

Q16. How do you feel about the information disclosed from the said digital platform operators when using ad tech services to distribute advertisements? Please select from the following. [Multiple answers accepted]

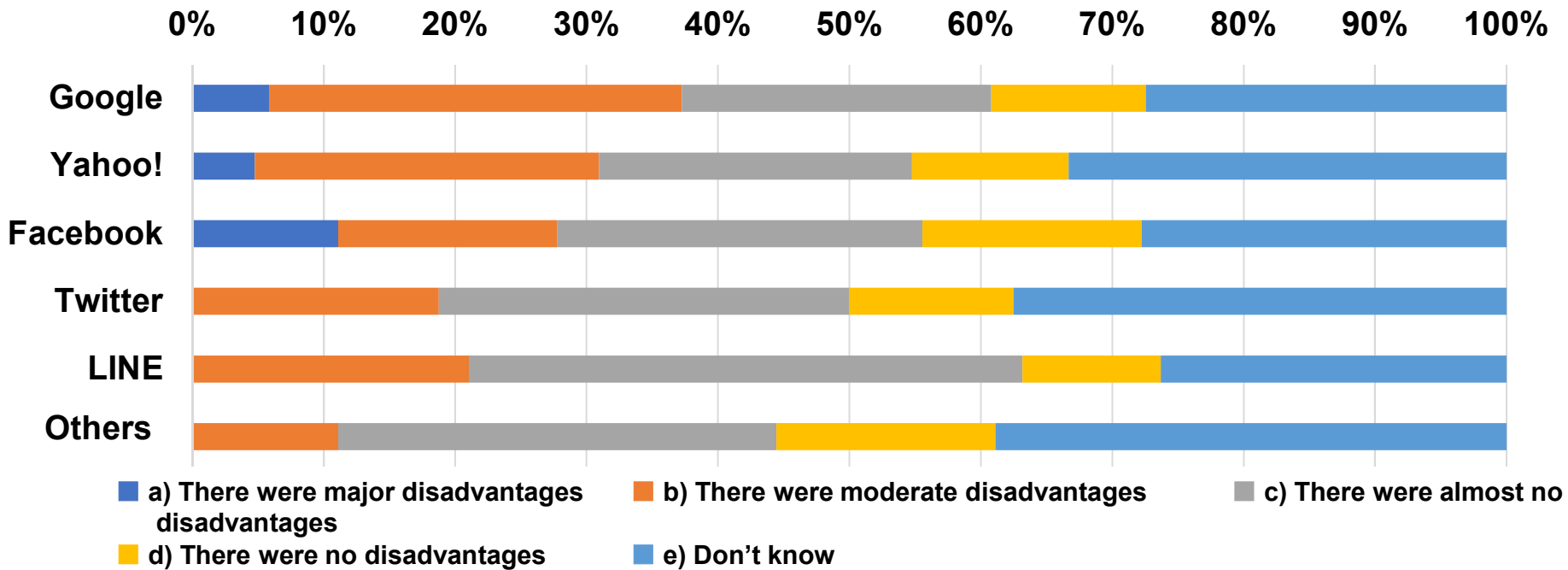


- a) There was a lack of disclosure on information related to bidding results, it cannot be taken into consideration in the following bidding as a precedent
- b) There was a lack of disclosure on ad fraud, making verification impossible
- c) There was no detailed breakdown of the fees paid to the said digital platform operators
- d) Even if disclosed information was adequate, the interface provided by the said digital platform operator was too complex, making it difficult to use necessary information
- e) Other (Select this option if you feel there were issues in information disclosure excluding the above a) to d))
- f) We do not have complaints

Q16. How do you feel about the information disclosed from the said digital platform operators when using ad tech services to distribute advertisements? Please select from the following. [Multiple answers accepted]

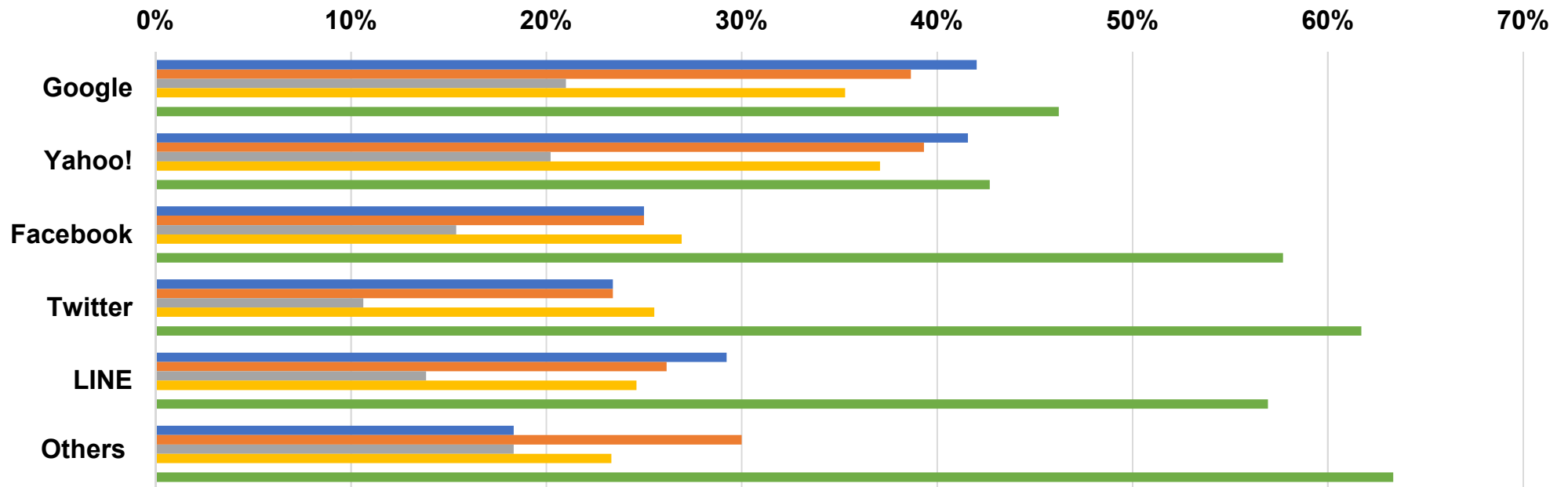
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There was a lack of disclosure on information related to bidding results, making applying information to future bidding impossible	26	21.8	17	19.1	6	11.5	6	12.8	6	9.2	11	18.3
b) There was a lack of disclosure on ad fraud, making verification impossible	30	25.2	23	25.8	9	17.3	5	10.6	9	13.8	10	16.7
c) There was no detailed breakdown of the fees paid to the said digital platform operators	29	24.4	26	29.2	10	19.2	8	17.0	9	13.8	10	16.7
d) Even if disclosed information was adequate, the interface provided by the said digital platform operator was too complex, making it difficult to use necessary information	13	10.9	11	12.4	4	7.7	4	8.5	4	6.2	6	10.0
e) Other (Select this option if you feel there were issues in information disclosure excluding the above a) to d))	3	2.5	3	3.4	-	-	-	-	-	-	1	1.7
f) We do not have complaints	68	57.1	47	52.8	34	65.4	31	66.0	46	70.8	42	70.0
Number of respondents	119	-	89	-	52	-	47	-	65	-	60	-

Q16-2. (For those who answered a) to e) at Q16) Did your company suffer disadvantages due to this? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	3	5.9	2	4.8	2	11.1	-	-	-	-	-	-
b) There were moderate disadvantages	16	31.4	11	26.2	3	16.7	3	18.8	4	21.1	2	11.1
c) There were almost no disadvantages	12	23.5	10	23.8	5	27.8	5	31.3	8	42.1	6	33.3
d) There were no disadvantages	6	11.8	5	11.9	3	16.7	2	12.5	2	10.5	3	16.7
e) Don't know	14	27.5	14	33.3	5	27.8	6	37.5	5	26.3	7	38.9
Number of respondents	51	100.0	42	100.0	18	100.0	16	100.0	19	100.0	18	100.0

Q17. What are your feelings about the transparency of supply chains (overall connections from advertisers to publishers) of ad tech services provided by digital platform operators which are in use in your company? Please select from the following. [Multiple answers accepted]

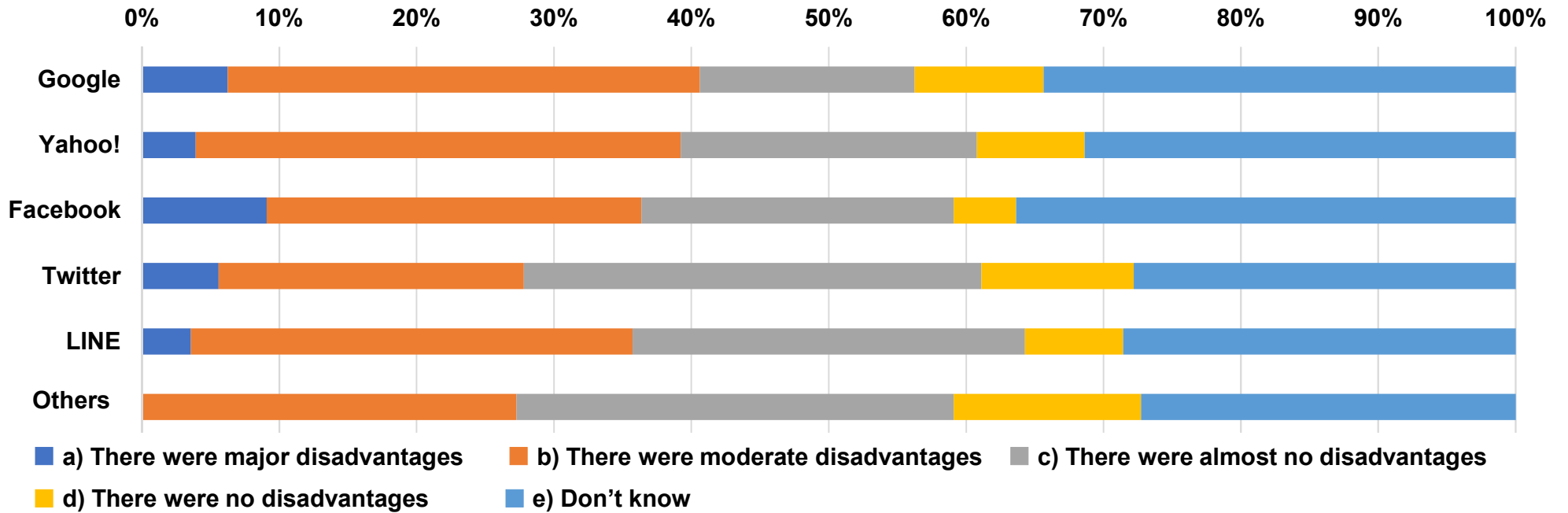


- a) There is a need to heighten transparency for business transactions and fees
- b) There is a need to heighten transparency for commission and costs
- c) There is a need to heighten transparency for pages and media publishing advertisements
- d) There is a need to heighten transparency for data-related factors
- e) Other (Select this option if you feel there are issues in supply chain transparency excluding the above a) to d))
- f) We do not have complaints

Q17. What are your feelings about the transparency of supply chains (overall connections from advertisers to publishers) of ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

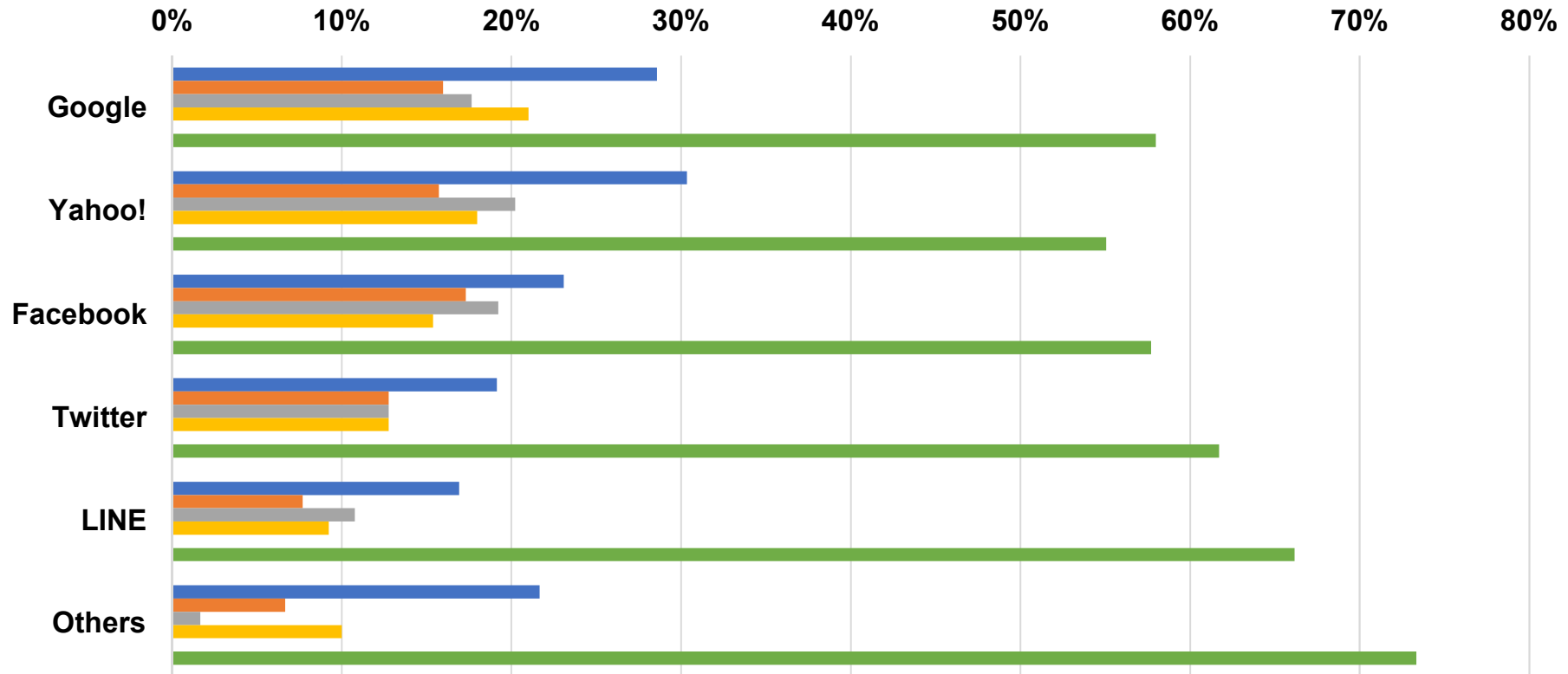
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There is a need to heighten transparency for business transactions and fees	50	42.0	37	41.6	13	25.0	11	23.4	19	29.2	11	18.3
b) There is a need to heighten transparency for commission and costs	46	38.7	35	39.3	13	25.0	11	23.4	17	26.2	18	30.0
c) There is a need to heighten transparency for pages and media publishing advertisements	25	21.0	18	20.2	8	15.4	5	10.6	9	13.8	11	18.3
d) There is a need to heighten transparency for data-related factors	42	35.3	33	37.1	14	26.9	12	25.5	16	24.6	14	23.3
e) Other (Select this option if you feel there are issues in supply chain transparency excluding the above a) to d))	-	-	-	-	-	-	-	-	-	-	-	-
f) We do not have complaints	55	46.2	38	42.7	30	57.7	29	61.7	37	56.9	38	63.3
Number of respondents	119	-	89	-	52	-	47	-	65	-	60	-

Q17-2. (For those who answered a) to e) at Q17) Did your company suffer disadvantages due to this? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	4	6.3	2	3.9	2	9.1	1	5.6	1	3.6	-	-
b) There were moderate disadvantages	22	34.4	18	35.3	6	27.3	4	22.2	9	32.1	6	27.3
c) There were almost no disadvantages	10	15.6	11	21.6	5	22.7	6	33.3	8	28.6	7	31.8
d) There were no disadvantages	6	9.4	4	7.8	1	4.5	2	11.1	2	7.1	3	13.6
e) Don't know	22	34.4	16	31.4	8	36.4	5	27.8	8	28.6	6	27.3
Number of respondents	64	100.0	51	100.0	22	100.0	18	100.0	28	100.0	22	100.0

Q18. What are your feelings about measures taken against ad fraud (generation of invalid impressions and clicks generated by bots to earn unjust ad income) by ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

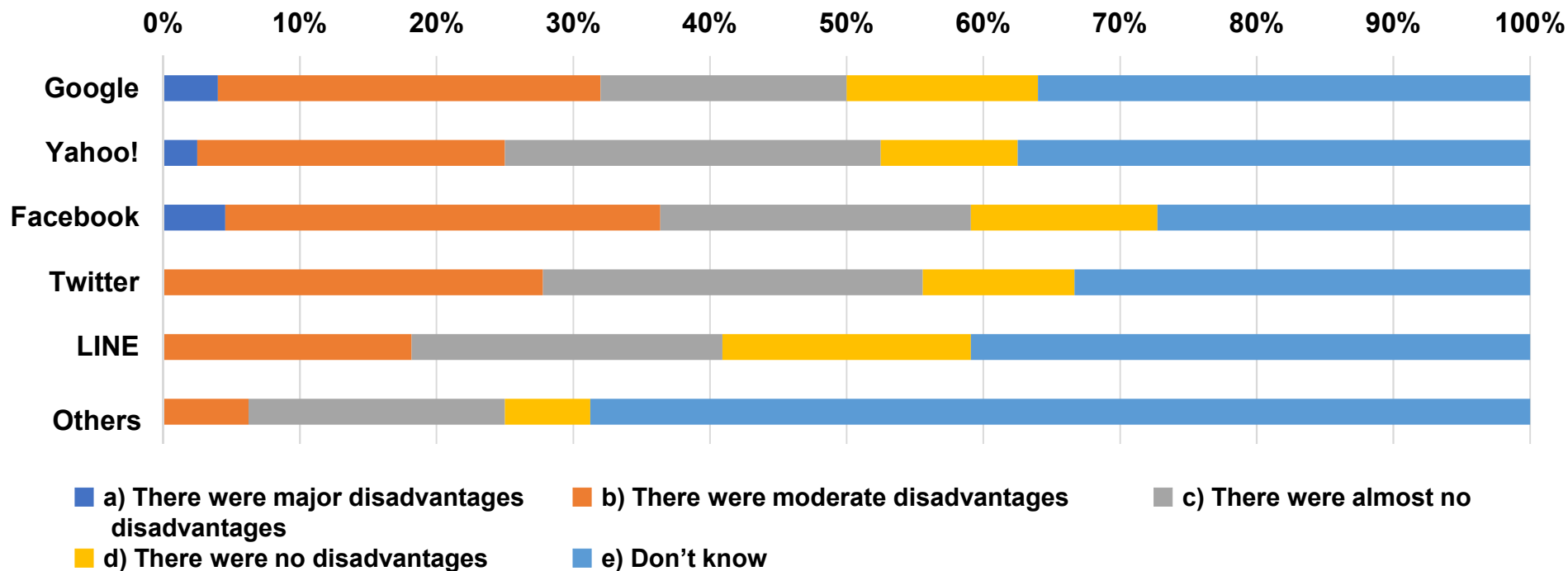


- a) There was a lack of information disclosure on ad fraud
- b) There was insufficient verification of traffic to uncover ad fraud
- c) There was lack of preventive measures for ad fraud
- d) The timing of refunds is opaque when ad fraud is discovered
- e) Other (Select this option if you feel there were issues in ad fraud excluding the above a) to d))
- f) We do not have complaints

Q18. What are your feelings about measures taken against ad fraud (generation of invalid impressions and clicks generated by bots to earn unjust ad income) by ad tech services provided by digital platform operators used by your company? Please select from the following. [Multiple answers accepted]

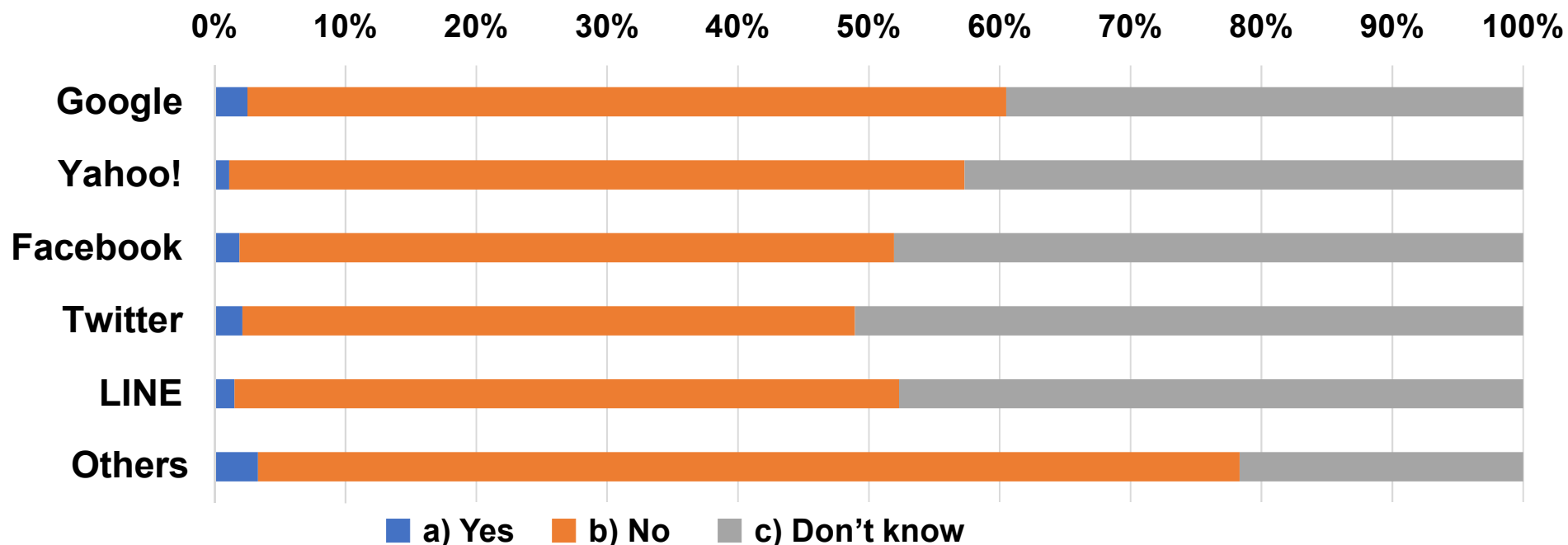
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There was a lack of information disclosure on ad fraud	34	28.6	27	30.3	12	23.1	9	19.1	11	16.9	13	21.7
b) There was insufficient verification of traffic to uncover ad fraud	19	16.0	14	15.7	9	17.3	6	12.8	5	7.7	4	6.7
c) There was lack of preventive measures for ad fraud	21	17.6	18	20.2	10	19.2	6	12.8	7	10.8	1	1.7
d) The timing of refunds is opaque when ad fraud is discovered	25	21.0	16	18.0	8	15.4	6	12.8	6	9.2	6	10.0
e) Other (Select this option if you feel there were issues in ad fraud excluding the above a) to d))	-	-	-	-	-	-	-	-	-	-	-	-
g) We do not have complaints	69	58.0	49	55.1	30	57.7	29	61.7	43	66.2	44	73.3
Number of respondents	119	-	89	-	52	-	47	-	65	-	60	-

**Q18-2. (For those who answered a) to e) at Q18) Did your company suffer disadvantages due to this?
[Select one]**



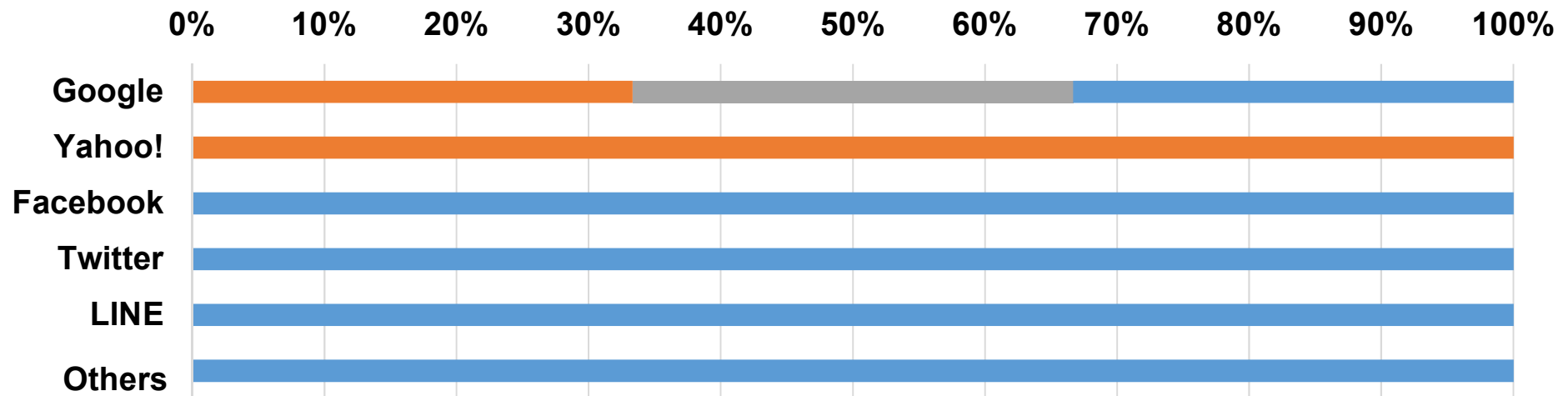
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) There were major disadvantages	2	4.0	1	2.5	1	4.5	-	-	-	-	-	-
b) There were moderate disadvantages	14	28.0	9	22.5	7	31.8	5	27.8	4	18.2	1	6.3
c) There were almost no disadvantages	9	18.0	11	27.5	5	22.7	5	27.8	5	22.7	3	18.8
d) There were no disadvantages	7	14.0	4	10.0	3	13.6	2	11.1	4	18.2	1	6.3
e) Don't know	18	36.0	15	37.5	6	27.3	6	33.3	9	40.9	11	68.8
Number of respondents	50	100.0	40	100.0	22	100.0	18	100.0	22	100.0	16	100.0

Q19. When using ad tech services provided by digital platform operators, were there any limitations imposed by the said digital platform operators, in access to necessary data (e.g., data to be used for advertisement efficiency verification) for advertisement distribution (or agency businesses for ad agencies) ? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Yes	3	2.5	1	1.1	1	1.9	1	2.1	1	1.5	2	3.3
b) No	69	58.0	50	56.2	26	50.0	22	46.8	33	50.8	45	75.0
c) Don't know	47	39.5	38	42.7	25	48.1	24	51.1	31	47.7	13	21.7
Number of respondents	119	100.0	89	100.0	52	100.0	47	100.0	65	100.0	60	100.0

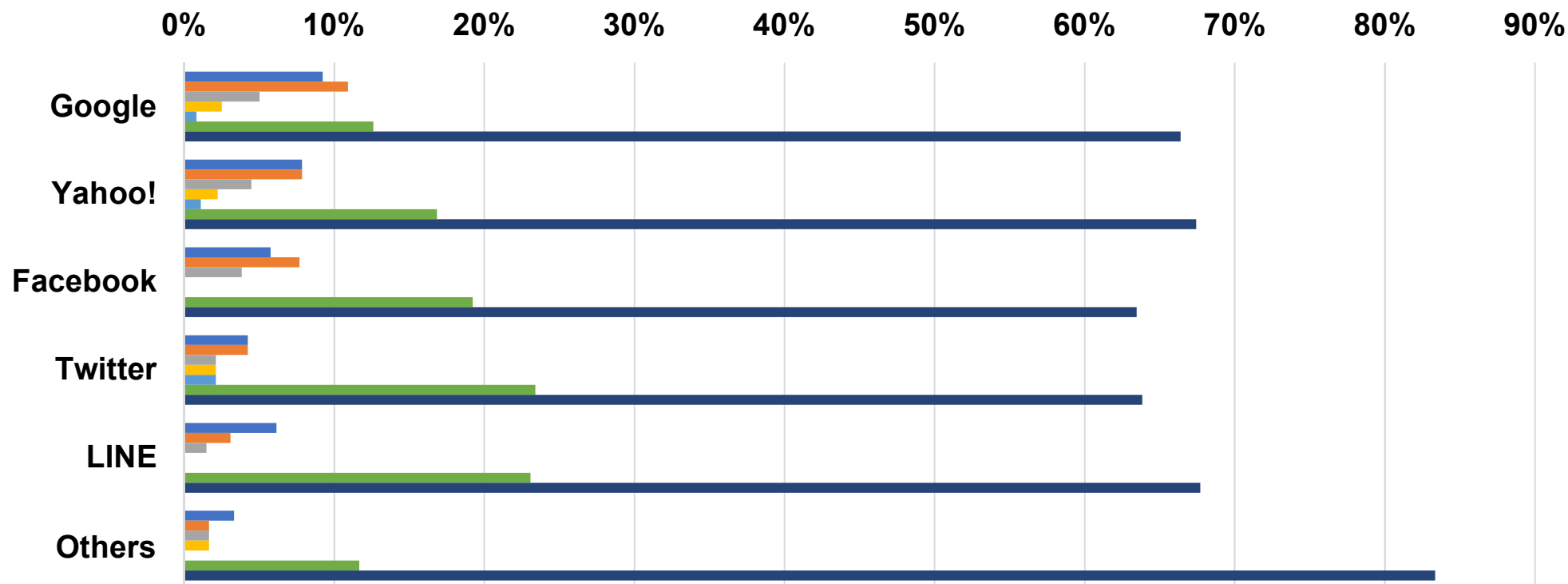
Q19-2. (For those who answered “a) Yes” at Q19) How did this impact your business activities? [Select one]



■ a) It had a serious impact on business activities
 ■ b) It had a moderate impact on business activities
 ■ c) It had only a slight impact on business activities
 ■ d) There had been no impact on business activities
 ■ e) Don't know

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	1	33.3	1	100.0	-	-	-	-	-	-	-	-
c) It had only a slight impact on business activities	1	33.3	-	-	-	-	-	-	-	-	-	-
d) There had been no impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
e) Don't know	1	33.3	-	-	1	100.0	1	100.0	1	100.0	2	100.0
Number of respondents	3	100.0	1	100.0	1	100.0	1	100.0	1	100.0	2	100.0

Q20. Have you ever felt dissatisfied with review standards when opening an account to use ad tech services provided by digital platform operators? (This includes accounts reviewed midway as well) [Multiple answers accepted]

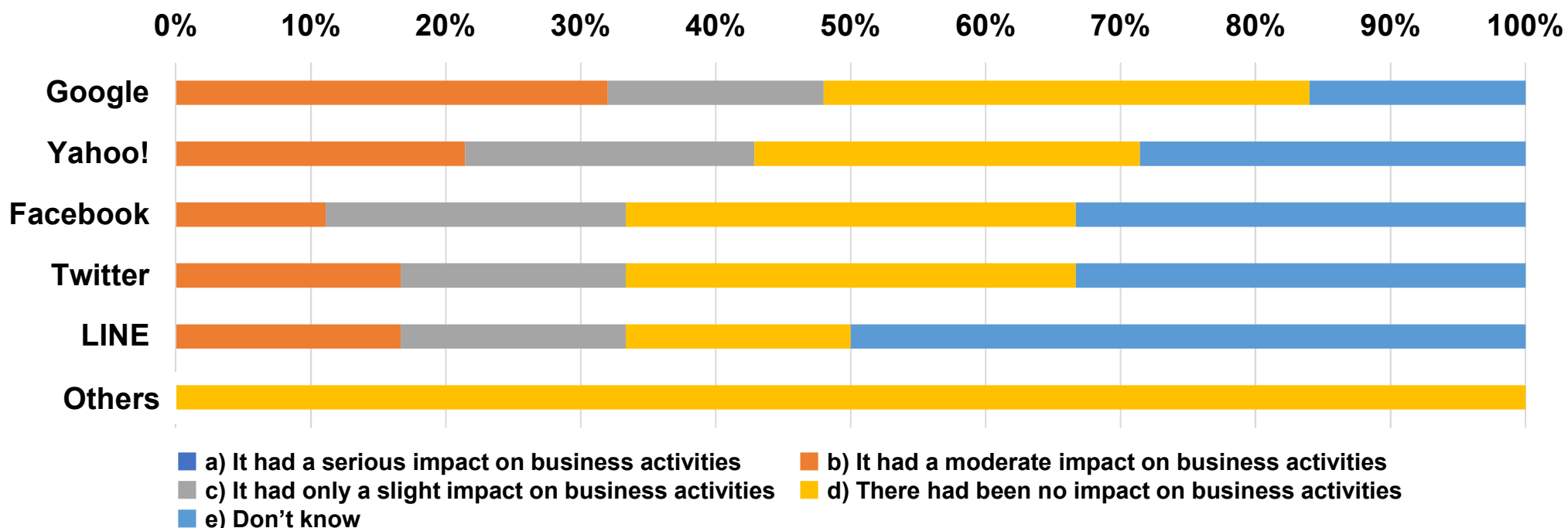


- a) Although review standards are disclosed, the standards are abstract and lack objectivity
- b) Review standards are not fully disclosed and lack transparency
- c) We feel the actual reviews are not done according to the disclosed standards
- d) The reviews are prejudiced and lack consistency
- e) Other (Select this option if there are issues in account review standards excluding the above a) to d))
- f) Don't know
- g) We do not have complaints

Q20. Have you ever felt dissatisfied with review standards when opening an account to use ad tech services provided by digital platform operators? (This includes accounts reviewed midway as well) [Multiple answers accepted]

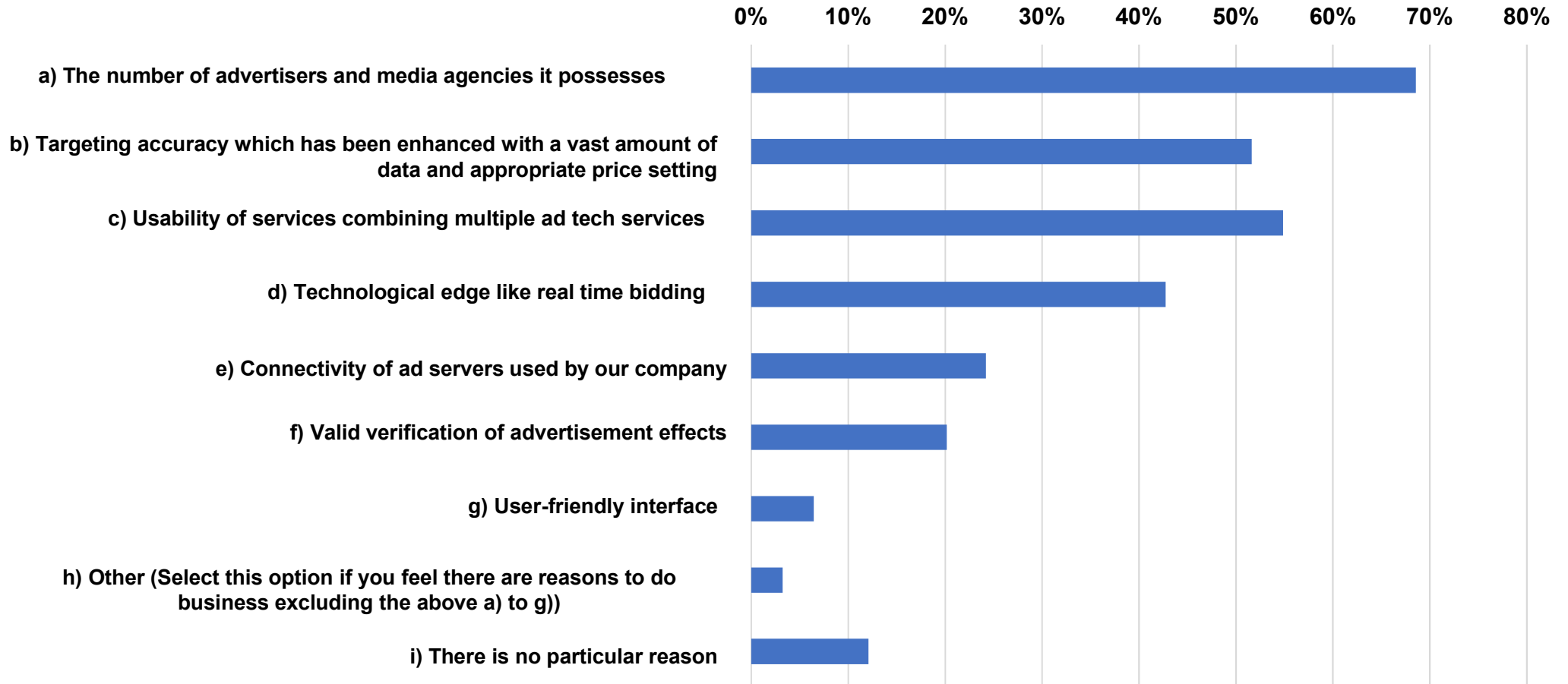
Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) Although review standards are disclosed, the standards are abstract and lack objectivity	11	9.2	7	7.9	3	5.8	2	4.3	4	6.2	2	3.3
b) Review standards are not fully disclosed and lack transparency	13	10.9	7	7.9	4	7.7	2	4.3	1	3.1	1	1.7
c) We feel the actual reviews are not done according to the disclosed standards	6	5.0	4	4.5	2	3.8	1	2.1	1	1.5	1	1.7
d) The reviews are prejudiced and lack consistency	3	2.5	2	2.2	-	-	1	2.1	-	-	1	1.7
e) Other (Select this option if there are issues in account review standards excluding the above a) to d))	1	0.8	1	1.1	-	-	1	2.1	-	-	-	-
f) Don't know	15	12.6	15	16.9	10	19.2	11	23.4	15	23.1	7	11.7
g) We do not have complaints	79	66.4	60	67.4	33	63.5	30	63.8	44	67.7	50	83.3
Number of respondents	119	-	89	-	52	-	47	-	65	-	60	-

Q20-2. (For those who answered a) to e) at Q20) How did this impact your business activities? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) It had a serious impact on business activities	-	-	-	-	-	-	-	-	-	-	-	-
b) It had a moderate impact on business activities	8	32.0	3	21.4	1	11.1	1	16.7	1	16.7	-	-
c) It had only a slight impact on business activities	4	16.0	3	21.4	2	22.2	1	16.7	1	16.7	-	-
d) There had been no impact on business activities	9	36.0	4	28.6	3	33.3	2	33.3	1	16.7	3	100.0
e) Don't know	4	16.0	4	28.6	3	33.3	2	33.3	3	50.0	-	-
Number of respondents	25	100.0	14	100.0	9	100.0	6	100.0	6	100.0	3	100.0

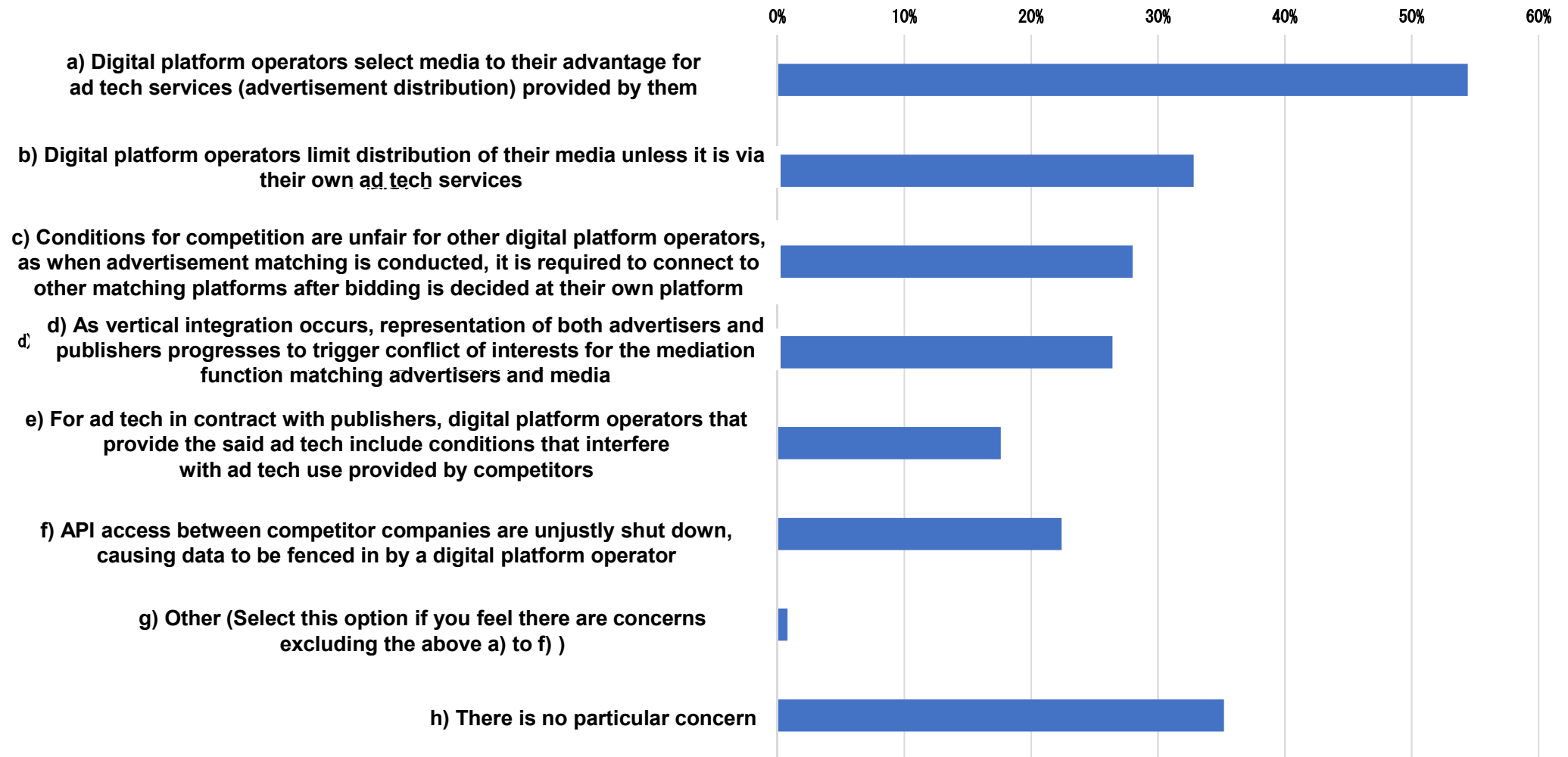
Q21. What are the reasons your company conducts direct business transactions with your current digital platform operator? Please select from the following. [Multiple answers accepted]



Q21. What are the reasons your company conducts direct business transactions with your current digital platform operator? Please select from the following. [Multiple answers accepted]

Answers	Number of answers	Ratio (%)
a) The number of advertisers and media agencies It possesses	85	68.5
b) Targeting accuracy which has been enhanced with a vast amount of data and appropriate price setting	64	51.6
c) Usability of services combining multiple ad tech services	68	54.8
d) Technological edge like real time bidding	53	42.7
e) Connectivity of ad servers used by our company	30	24.2
f) Valid verification of advertisement effects	25	20.2
g) User-friendly interface	8	6.5
h) Other (Select this option if you feel there are reasons to do business excluding the above a) to g))	4	3.2
i) There is no particular reason	15	12.1
Number of respondents	124	-

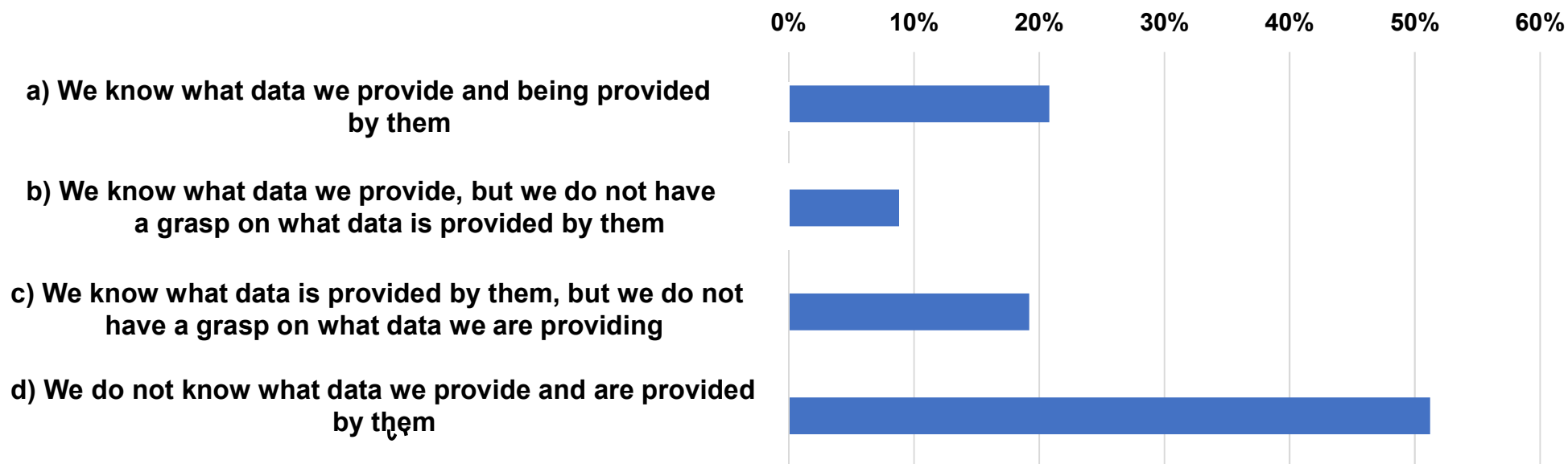
Q22. Currently, in the digital advertising market, there seems to be a certain movement (vertical integration); digital platform operators manage powerful mediums while distributing advertisements (matching) using ad tech in the backdrop of the said media's power. Do you have any concerns about this progression of vertical integration? If so, what concerns do you have? Please select from the following. [Multiple answers accepted]



Q22. Currently, in the digital advertising market, there seems to be a certain movement (vertical integration); digital platform operators manage powerful mediums while distributing advertisements (matching) using ad tech in the backdrop of the said media's power. Do you have any concerns about this progression of vertical integration? If so, what concerns do you have? Please select from the following. [Multiple answers accepted]

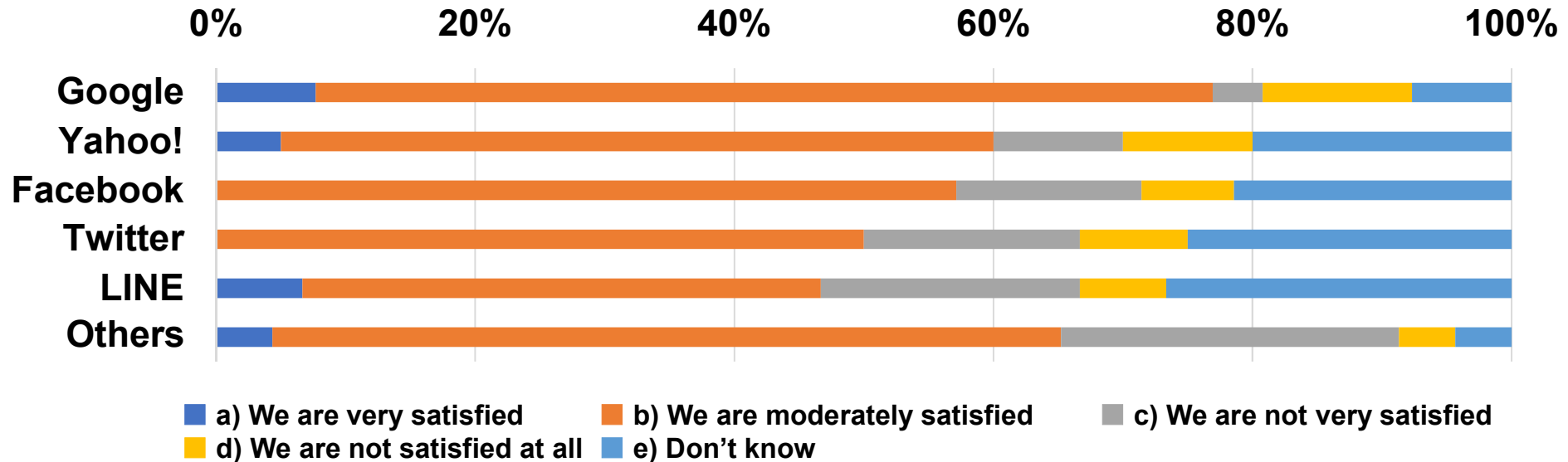
Answers	Number of answers	Ratio (%)
a) Digital platform operators select media to their advantage for ad tech services (advertisement distribution) provided by them	68	54.4
b) Digital platform operators limit distribution of their media unless it is via their own ad tech services	41	32.8
c) Conditions for competition are unfair for other digital platform operators, as when advertisement matching is conducted, it is required to connect to other matching platforms after bidding is decided at their own platform	35	28.0
d) As vertical integration occurs, representation of both advertisers and publishers progresses to trigger conflict of interests for the mediation function matching advertisers and media	33	26.4
e) For ad tech in contract with publishers, digital platform operators that provide the said ad tech include conditions that interfere with ad tech use provided by competitors	22	17.6
f) API access between competitor companies are unjustly shut down, causing data to be fenced in by a digital platform operator	28	22.4
g) Other (Select this option if you feel there are concerns excluding the above a) to f))	1	0.8
h) There is no particular concern	44	35.2
Number of respondents	125	-

Q23. When using ad tech services provided by digital platform operators, do you have a grasp on what type of data you provide to them, or what type of data is provided from them? [Select one]



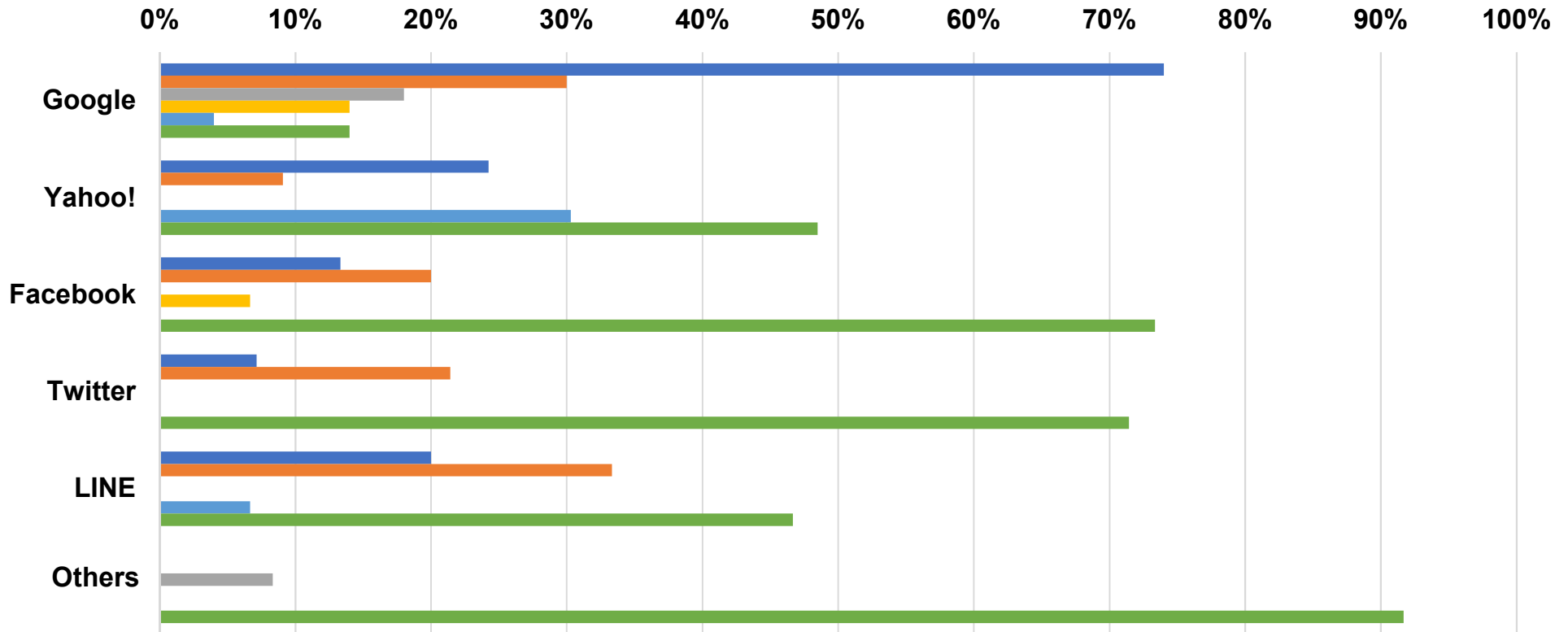
Answers	回答数	割合(%)
a) We know what data we provide and being provided by them	26	20.8
b) We know what data we provide, but we do not have a grasp on what data is provided by them	11	8.8
c) We know what data is provided by them, but we do not have a grasp on what data we are providing	24	19.2
d) We do not know what data we provide and are provided by them	64	51.2
Number of respondents	125	100.0

Q23-3. (For those who answered “a) We know what data we provide and are being provided by them” at Q23) Are you satisfied with the data provided by the digital platform operation when compared to the data you provide to them? [Select one]



Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) We are very satisfied	2	7.7	1	5.0	-	-	-	-	1	6.7	1	4.3
b) We are moderately satisfied	18	69.2	11	55.0	8	57.1	6	50.0	6	40.0	14	60.9
c) We are not very satisfied	1	3.8	2	10.0	2	14.3	2	16.7	3	20.0	6	26.1
d) We are not satisfied at all	3	11.5	2	10.0	1	7.1	1	8.3	1	6.7	1	4.3
e) Don't know	2	7.7	4	20.0	3	21.4	3	25.0	4	26.7	1	4.3
Number of respondents	26	100.0	20	100.0	14	100.0	12	100.0	15	100.0	23	100.0

Q24. (For those to answered a) or b) for at least one question out of Q8-2, Q8-2, Q11-2, Q13-2, Q14-1-2, Q15-2, Q16-2, Q17-2, Q18-2, Q19-2 and Q20-2. This question is for companies who answered they have a certain amount of disadvantageous effects due to actions taken by digital platform operators. Do you believe your company has no choice but to use ad tech services offered by digital platform operators? If so, please select the reasons from the following. [Multiple answers accepted]



- a) The turnout from the ad tech services has a large share in our total sales
- b) There are no other ad tech service providers except the ad tech service provider in question
- c) The human and financial burden of transitioning to another ad tech service is too large
- d) The accumulated data (such as transaction data) of the said ad tech service is necessary for business
- e) Other (Select this option if you feel there is no other choice to use the current service excluding the above a) to d))
- f) We do not believe our company has no choice but to use ad tech services in question

Q24. (For those to answered a) or b) for at least one question out of Q8-2, Q8-2, Q11-2, Q13-2, Q14-1-2, Q15-2, Q16-2, Q17-2, Q18-2, Q19-2 and Q20-2. This question is for companies who answered they have a certain amount of disadvantageous effects due to actions taken by digital platform operators. Do you believe your company has no choice but to use ad tech services offered by digital platform operators? If so, please select the reasons from the following. [Multiple answers accepted]

Answers	Google		Yahoo!		Facebook		Twitter		LINE		Others	
	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)	Number of answers	Ratio (%)
a) The turnout from the ad tech services has a large share in our total sales	37	74.0	8	24.2	2	13.3	1	7.1	3	20.0	-	-
b) There are no other ad tech service providers except the ad tech service provider in question	15	30.0	3	9.1	3	20.0	3	21.4	5	33.3	-	-
c) The human and financial burden of transitioning to another ad tech service is too large	9	18.0	-	-	-	-	-	-	-	-	1	8.3
d) The accumulated data (such as transaction data) of the said ad tech service is necessary for business	7	14.0	-	-	1	6.7	-	-	-	-	-	-
e) Other (Select this option if you feel there is no other choice to use the current service excluding the above a) to d))	2	4.0	10	30.3	-	-	-	-	1	6.7	-	-
f) We do not believe our company has no choice but to use ad tech services in question	7	14.0	16	48.5	11	73.3	10	71.4	7	46.7	11	91.7
Number of respondents	50	-	33	-	15	-	14	-	15	-	12	-